



# **Agile Product Lifecycle Management**

Installing Agile PLM for OAS

v9.2.2.5

Part No. E12802-03

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# Preface

The Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

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**Note** To read the PDF files, you must use the free Adobe Acrobat Reader version 7.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

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The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> can be accessed through Help > Manuals in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact [support](http://www.oracle.com/agile/support.html) <http://www.oracle.com/agile/support.html> (<http://www.oracle.com/agile/support.html>) for assistance.

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**Note** Before calling Agile Support about a problem with an Agile PLM manual, please have the full part number, which is located on the title page.

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## TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, 7 days a week. For TTY support, call 800.446.2398. Outside the United States, call +1.407.458.2479.

## Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html>

## Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) [http://www.oracle.com/education/chooser/selectcountry\\_new.html](http://www.oracle.com/education/chooser/selectcountry_new.html) for more information on Agile Training offerings.

## Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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# Installation Checklists

**This chapter includes the following:**

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## Pre-Installation Checklist

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**Note** If you are installing on Windows, you must have local Administrator privileges.

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Before installing the Agile PLM software, you need to log in to your machine and check the following:

- ☐ Can you ping all servers, including the database server, on which you plan to install Agile PLM components? For example, try pinging the database server from the application server.
- ☐ Have you verified the Domain Name System (DNS) host name of each server on which you plan to install Agile PLM components? In DNS, the fully qualified domain name consists of the hostname, then a period, then the domain name.

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**Note** When you are prompted by the Agile PLM installer to enter a host name, enter the fully qualified domain name of the server.

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- ☐ Is your Agile PLM database server installed and running?
- ☐ Is Oracle Application Server 10g (10.1.3.1.0) installed?

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**Note** Installation of Oracle Application Server 10g from the Agile PLM installer is only available on Windows.

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- ☐ Have you verified that you have read, write, and execute permissions for the computer on which you want to install Agile PLM?

Additionally, if you are upgrading:

- ☐ Have you backed up the files on your File Manager server?
- ☐ Have you uninstalled the previous version of Agile PLM?

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**Note** You must be able to complete this checklist before installing Agile PLM.

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## Application Server Installation Checklist

Follow these steps to install the Agile Application Server:

- ☐ Install Oracle Application Server 10g (10.1.3.1.0) J2EE Server and Web Server.

See "Installing Oracle Application Server".

- ☐ Stop the Oracle Application Server.

See "Stopping Oracle Application Server".

- ☐ Install the Agile PLM **Application Server** component.

See "Installing Agile PLM."

---

<b>Note</b>	The Agile PLM installer may prompt for you to stop Oracle Application Server even though it is already stopped. If so, Click OK to continue.
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- ☐ **On Windows:** Restart the machine.

- ☐ Configure JMS resources and deploy the Agile application on Oracle Application Server.

See "Deploying the Agile Application".

- ☐ Verify that the Agile Application Server is working properly.

See "[Verifying Your Agile Application Server](#) (on page 21)".

- ☐ (Optional) Configure a Web proxy server for your Agile PLM system.

To install the Oracle Application Server plug-in and other files needed to use Microsoft Internet Information Services (IIS) as your Web proxy server, install the Agile PLM **Web Proxies** component on your Web server. See "Installing Agile PLM."

To configure your Web proxy server, see "Configuring a Web Proxy Server for Agile PLM."

## Clustered Application Server Installation Checklist

Follow these steps to install an Agile Application Server cluster:

- ☐ Install Oracle Application Server 10g (10.1.3.1.0) J2EE Server and Web Server on each server.

**Important** Make sure all servers in the cluster use the same operating system.

See About Agile Application Server Clusters and "Installing Oracle Application Server".

- ☐ Install Agile PLM on the primary server. Make sure you choose **Advanced Mode** during installation.

See "[Installing Agile PLM on the Primary Server](#) (on page 28)."

- ☐ Install Agile PLM on the secondary server. Make sure you choose **Advanced Mode** during installation.

See "[Installing Agile PLM on the Secondary Server](#) (on page 28)."

- ❑ Start and configure the servers.  
See "[Starting and Configuring the Primary and Secondary Servers](#)" ("Configuring the Primary and Secondary Servers" on page 28)."
- ❑ Deploy the Agile application in the cluster.  
See "Deploying the Agile Application in a Cluster."
- ❑ Configure a Web proxy server or a load balancer for your Agile PLM system.  
For information about configuring a Web proxy server, see [Configuring a Web Proxy Server for Agile PLM](#) (on page 43).  
For information about configuring a load balancer, see "Configuring the Load Balancer".
- ❑ **On Solaris or Linux or AIX:** Configure the JNLP MIME type.  
See "[Configuring the JNLP MIME Type on U](#)" (see "Configuring the JNLP MIME Type on UNIX" on page 32)NIX".
- ❑ Configure the Java Client.  
See "Configuring the Java Client Settings."
- ❑ Verify that the Agile cluster is working properly.  
See "[Testing the Agile Cluster](#)" (on page 31)".

## File Manager Installation Checklist

Follow these steps to install the File Manager:

- ❑ If you are upgrading to Agile PLM 9.2.2.4 from a release prior to Agile 9, back up and reorganize your file vault.  
See "Upgrading the File Vault".
- ❑ Install the Agile PLM **File Manager** component.  
See "Installing Agile PLM."
- ❑ Start the Agile Application Server.
- ❑ (Optional) Configure a Proxy Server for the File Manager.  
See "Configuring a Web Proxy Server for Agile PLM."
- ❑ Configure the File Manager.  
See "[Configuring the File Manager](#)" (on page 33)".
- ❑ Start the File Manager.  
See "[Starting the File Manager](#)" (on page 41)".
- ❑ Verify that the File Manager is working properly.  
See "[Validating the File Manager Installation](#)" (on page 41)".

## Web Proxy Server Installation Checklist

Follow these steps to configure a Web proxy server in your company's DMZ for the Agile Application Server and Agile File Manager:

- ☐ Stop your Web server.
- ☐ Install the Agile PLM **Web Proxies** component.  
See "Installing Agile PLM."
- ☐ Configure your Web server to be a proxy server for either the Agile Application Server, the Agile File Manager, or both.  
See "Configuring a Web Proxy Server for Agile PLM."
- ☐ Test the connection by logging into the Agile Web Client.  
See "Logging In to the Agile Web Client".

# Upgrading to Agile PLM 9.2.2.4

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## Overview

Agile PLM 9.2.2.4 is a full install that can be distributed over a wide-area network with multiple servers, or it can be limited to a single server with several client computers.

**Important** Before upgrading to Agile PLM 9.2.2.4, read through this entire chapter and the Readme for the latest information. For information about optional upgrade services available from Agile, contact Agile Technical Support.

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<b>Note</b>	All folder names and paths show the default settings provided during installation. Your system structure may be different if folder names or paths were changed during the Agile PLM 9.2.2.4 installation.
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## Upgrading Agile Server Components

Before you upgrade any components, you should make sure that all components in the Agile system work and communicate properly. Performing an upgrade on a system that is not functioning correctly will compound troubleshooting techniques.

**Important** Refer to the *Agile PLM Database Upgrade Guide* for schema upgrade requirements.

## System Requirements for Upgrading

Additional hard disk space may be required to efficiently upgrade to Agile PLM 9.2.2.4. Before you can install Agile PLM server components, you must have at least 60 MB of available disk space available where the OS is installed. It is also recommended that you have at least 100 MB of available disk space for the upgrade.

## Checking Available Disk Space and Tablespace Size

Be sure you have enough unused disk space available on the computer where the database is

installed before upgrading—at least 100 MB plus an amount equal to 100 percent of your current database and at least twice the size of your user-data tablespace.

**Important** Refer to the *Agile Database Installation Guide* for tablespace requirements.

## Backing Up Files

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<b>Note</b>	Agile PLM 9.2.2.4 is a full install and installs into a new default location. If you accept this location, earlier Agile releases will not be overwritten.
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Back up any existing ChangeCAST and other Agile-related folders to a safe location before upgrading any component to Agile PLM 9.2.2.4.

## Disabling Windows Services

Before upgrading Agile on Windows servers, disable any Agile services.

### To disable Agile services:

1. Ensure that all Agile services are stopped:
  - a. Choose Start > Settings > Control Panel.
  - b. double-click the Administrative Tools icon and then double-click the Services icon.
  - c. For each Agile service in the Services dialog box, select the service, right-click and choose Stop in the shortcut menu. Also for each service, open the Properties dialog box and change the Startup Type to Disabled.
  - d. You must also stop the IIS Admin service if it is running.
  - e. Close the Services dialog box.
2. Restart all Windows servers in the Agile PLM system.

## Backing Up the Windows Registry

If you are upgrading Agile on Windows servers, the registry contains information created by the Agile installation program. You can backup registry branches so that you can return your system to its previous state.

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<b>Note</b>	If you have disk space available, you can backup the entire registry (instead of specific branches) before upgrading to Agile PLM 9.2.2.4.
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### To use regedit to backup registry branches:

1. Choose Start > Run.
2. Type regedit in the Open field of the Run dialog box.

The Registry window opens.
3. Expand the HKEY\_LOCAL\_MACHINE > Software tree and select the Agile registry branch.
4. Choose Registry > Export Registry File.

The Export Registry File dialog box appears.
5. Make sure the Agile branch appears in the Select Branch field.



6. Name the branch agilebranch, and save it to a secure location.
7. Select the Oracle registry branch and save it as oraclebranch to a secure location.

In the event you do not want to continue using this release of Agile PLM 9.2.2.4, you can import these registry branches, and then restart the computer.

## Upgrading the Database

The Agile database must be upgraded before deploying the Agile Application Server. Refer to the *Agile PLM Database Upgrade Guide* for details about upgrading the Agile PLM 9.2.2.4 database

## Upgrading the Agile PLM 9.2.2.4 Application

You should uninstall the previous version of Agile PLM before installing Agile PLM 9.2.2.4 which is a full install.

**Important** Do not install into the same folder used by the previous installation of Agile. Choose a new installation location.

## Upgrading the File Vault

If you are upgrading to Agile PLM 9.2.2.4 from a version prior to 9.2, the file vault structure must be reorganized. In previous versions of Agile, files were stored in the <iFS Root> or files directory. In the new design, files are stored in separate directories based on a file ID. All existing files must be reorganized to conform to the new design specifications. If you have an existing iFS or Distributed File Manager (DFM) configuration, you must reorganize the files on each file server.

### To reorganize existing files:

1. Back up any existing Agile file vaults to a safe location before upgrading any component to Agile PLM 9.2.2.4. The default location for Agile iFS Files in Agile 8.5 is [\\Program Files\Agile Product Collaboration\iFS\Files](#).  
  
If you have an existing Distributed File Managers, you must also back up the files on all the DFMs.
2. After you have copied all files into a backup directory, install the new File Manager by following the instructions in “Starting the Agile PLM Installer” if it is not already installed.
3. Copy any files that you backed up earlier into the File Manager Storage Location you specified during the file manager installation.
4. Go to the AGILE\_HOME\agileDomain\tools\ directory.
5. Run the iFSReorgV2 utility:

```
Usage: java -jar iFSReorgV2.jar -basedir <value> -oldFilePrefix <value>  
[-newFilePrefix <value>] [-logging <true/false>]
```

where

- basedir is the file vault location to be reorganized
- oldFilePrefix is the old file name prefix for the existing files in the vault

- newFilePrefix is the new file name prefix. All of the existing files will be renamed with this prefix. This is an optional argument. If it is not specified, the old file name prefix is used.
  - logging enables logging of warnings or errors if set to true. The log is saved to a file named ifsReorg.log.
6. After the program completes, the reorganization summary information displays.
  7. Go to ["Configuring the File Manager"](#) (see "Configuring the File Manager" on page 33) to configure the new file manager with the upgraded vault information and to validate the installation was successful.

## Upgrading the Agile PLM ActiveX Control

If you used the Microsoft Excel-based client to open Agile PLM 9.2 Declarations in Microsoft Excel, you have the Agile PLM ActiveX Control (version 1.0.313.1) installed on your client computer. Agile PLM 9.2.2.4 uses a later version (1.0313.8) of the Agile PLM ActiveX Control.

Optionally, you can uninstall the older Agile PLM ActiveX Control. If the Agile PLM preference Allow Downloading of Productivity Components is set to Yes, the next time you use the Agile Web Client to open a Declaration in Microsoft Excel, the latest version of the Agile PLM ActiveX Control will be downloaded and installed automatically.

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Note	Before uninstalling the Agile PLM ActiveX Control, close Microsoft Excel.
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## Upgrading Roles and Privilege Masks

When you upgrade your Agile PLM database, any existing Agile PLM roles and privilege masks that your company uses are not automatically updated to include new privileges and attributes. The Agile PLM administrator must update existing roles and privilege masks manually using the Agile Java Client.

Agile PLM includes a number of example roles that you can use to modify your own roles. They are stored under the Examples node folder in Java Client. Example roles are read-only and cannot be modified. However, you can use Save As to make a copy of an example role and modify the copy.

Example roles include example privilege masks. When you use Save As to create a copy of an example role, the system populates the new role with the privilege masks.

For more information on how to edit roles and privilege masks, see the *Agile PLM Administrator Guide*.

# Installing Agile PLM

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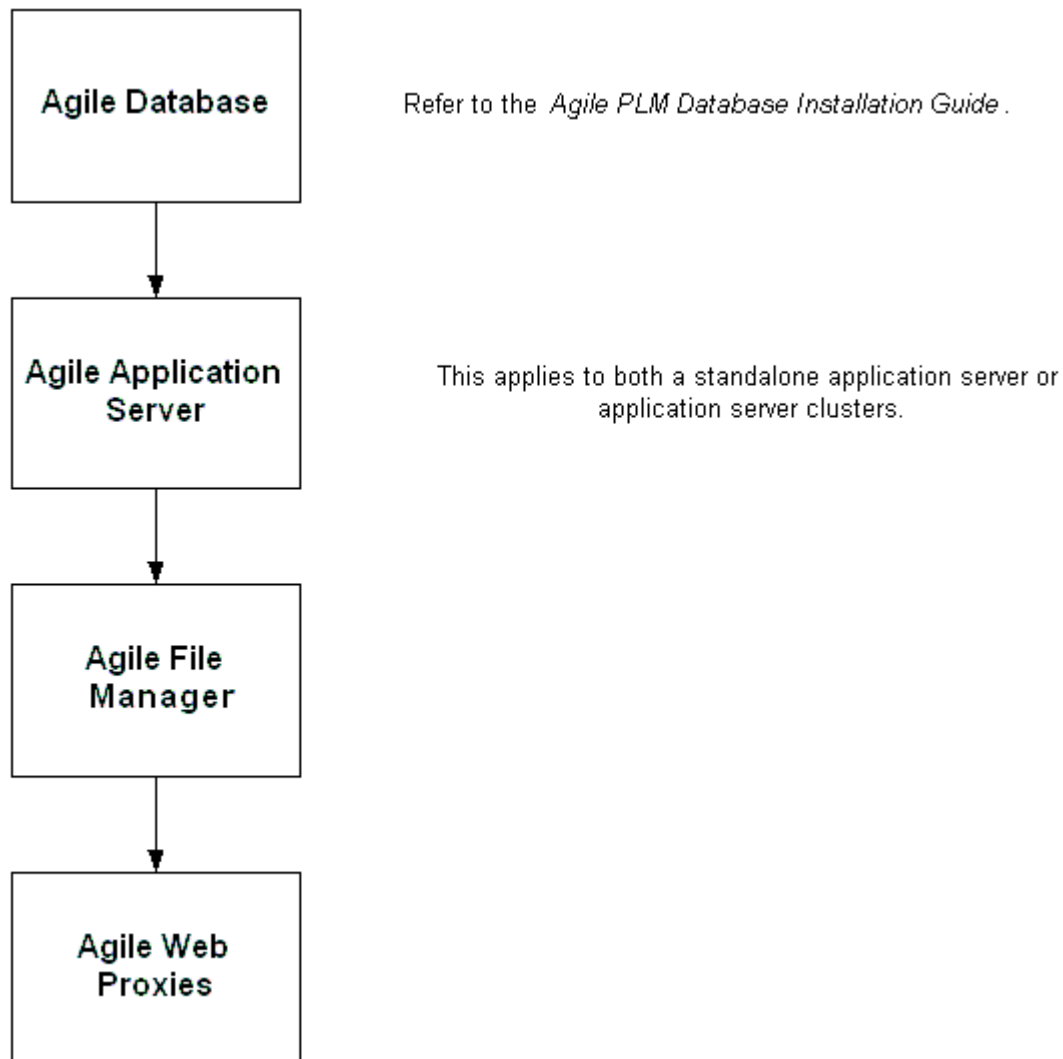
## Installation Process

The installation of Agile PLM 9.2.2.4 is a full install. Agile PLM is designed to run optimally on multiple computers. This guide is presented with separate chapters for certain Agile PLM components. To set up an Agile PLM system, you should install the components in the following order:

---

**Note** If you are installing the Application Server, File Manager, and Web Proxies on the same machine, they can be installed at the same time.

---



**Important** If you are upgrading from a previous version of Agile PLM, first read "[Upgrading to Agile PLM 9.2.2.4](#) (on page 5)".

## Agile PLM System Requirements

Agile PLM may be deployed in different configurations. The amount of time required to complete an installation depends on the complexity of your Agile PLM implementation.

---

Note	If you are installing on Windows, make sure you have installed all Windows updates, especially for the DirectX component.
------	---

---

For installations using a certified localized language, all server components must be installed on computers running the same localized OS. Clients can be running on the same localized OS or English OS. For detailed information about using Agile PLM with international operating systems, contact the Agile Support Web site.

The general recommended configuration for Agile PLM components is one computer for each of the following server components:

- Agile database
- Agile Application Server

It is acceptable to install multiple server components on the same computer if the additional resources are not available. However, the minimum hardware requirements must be increased based on the number of server components installed on a single computer. For specific hardware and software requirements, see the *Capacity Planning and Deployment Guide*.

Network service and TCP/IP protocol must be enabled before you install Agile PLM.

On Windows, if you receive the error message “Failed to retrieve domain name from registry. Please enter the domain name in the TCP/IP properties and try again later” and the installation aborts, then you must setup Network service, as follows:

1. From the Control Panel window, double-click the Network and Dial-up icon.
2. right-click on the Local Area Connection icon and choose Enable from the shortcut menu.

## Obtaining Software from Oracle MetaLink

Oracle minor release products are distributed as a Patchset/Minipack. A Patchset/Minipack is an electronic version of the software. To download the Product Patchset/Minipack, go to the Oracle MetaLink Web site ([https:// mlrepau.us.oracle.com/](https://mlrepau.us.oracle.com/)) and search for the Product. Refer to the Patchset/Minipack description and view the Readme. After you review the Readme, download the Product Patchset/Minipack.

There will be one zip file which contains all Product binaries, documentation, and database files. Follow the installation instructions from the Install Guide to install the product.

All Oracle MetaLink Web site files have been archived using Info-ZIP's highly portable Zip utility. After downloading one or more of the archives, you will need the UnZip utility or a WinZip utility to extract the files. You must unzip the archive on the platform for which it was intended. Verify that the file size of your downloaded file matches the file size displayed on MetaLink. Unzip each Zip file to its own temporary directory.

## Copying the Agile PLM Files

Before installing Agile PLM, the contents of the media packs should be copied to a local directory with the same file structure used by the Installer. The Platforms directory must be copied into the same directory as the setup file.

---

Note	Be sure to check the size of the media packs after copying the files to verify that all files have been copied.
------	---

---

## Starting the Agile PLM Installer

**Important** Install and test this release on a designated test server before installing it on your production environment. Your test environment should mirror your production environment as closely as possible to provide accurate testing results. It is important to validate the installation of this release and confirm your integrations are working correctly as part of your minimum due diligence. Any problems or questions noted during your system testing should be resolved before installing this release on your production environment.

The Agile PLM installer is a Java program. The installation of all components follows the same initial process up through the panel where you select the components to install.

Before running the installer, make sure

- On UNIX: You are not logged in as the root user. You should be logged in as the same user used to install the application server software.
- You have read and completed the pre-installation checklist. You should also read and follow the installation checklist for each Agile PLM component you plan to install. See "Installation Checklists."
- You have enough available disk space.  
Windows: at least 500MB of available disk space  
UNIX: at least 1700MB of available disk space on the drive where your default Temp directory is located.
- You have disabled virus protection.  
If virus protection is enabled, components used in the installer can be falsely identified as being infected and lock up the installation. You can enable virus protection after the installation is complete.

To start the Agile PLM installer on Windows:

### **Log in to the computer using a login with local Administrator permissions.**

1. In the Disk1\Windows directory, double-click the setup\_win.exe file.

---

Note	If there is insufficient Temp disk space available to complete the installation, you will be prompted for another location. Click Choose, select another drive, Click OK, and the installer will start.
------	---

---

After a few moments, the Welcome screen appears.

2. For information about any screen in the installer, click Help.

### **To start the Agile PLM installer on UNIX:**

1. Log into the system.

---

Note	If you are installing the Agile Application Server, make sure you log in as the same user that installed Oracle Application Server.
------	---

---

2. Open a terminal window.
3. Go to the directory where you copied the Agile PLM files. Locate the setup\_<OS>.bin file, and run the program by typing the following:

```
AIX: ./setup_aix.bin
Linux: ./setup_lin.bin
Solaris (SPARC): ./setup_sol.bin
Solaris(X86): ./setup_solx86.bin
```

After a few moments, the Welcome screen appears.

4. For information about any screen in the installer, click Help.

## Installer Online Help

Each installation panel has online help. At any time during installation, you can click Help for more information about the panel's options.

<b>Note</b>	If you leave the online help window open, it will be updated when you proceed through the installer panels. Otherwise, click Close at the bottom of the help window.
-------------	--

## Installer Buttons

Agile Product Interchange installation panels have the following buttons:

- ▣ **Cancel** — Exits from the installation program.
- ▣ **Help** — Displays online help.
- ▣ **Previous** — Returns to the previous step.
- ▣ **Next** — Proceeds to the next step.
- ▣ **Install** — Starts installing. The Install button appears only on the Pre-Installation Summary panel, after you have specified installation options.
- ▣ **Done** — Exits from the installation program. On Windows, after installing certain components you can choose whether to restart the computer when you click Done. The Done button appears only on the Install Complete panel, after you have finished installing.

## Agile PLM Components

During Agile PLM installation, you must select components to install. Choose from the following components.

Component	Platform	Installation/Configuration Documentation
<b>Application Server</b>	Windows/Solaris/Linux/AIX	Chapter 4, "Configuring the Agile Application Server" and Chapter 5, "Configuring Application Server Clusters"
<b>File Manager</b>	Windows/Solaris/Linux/AIX	Chapter 6, "Configuring the File Manager"
<b>Web Proxies</b>	Windows/Solaris/Linux/AIX	Chapter 7, "Configuring a Web Proxy Server for Agile PLM"

Component	Platform	Installation/Configuration Documentation
ChangeCAST Client (Upgrade only)	Windows	See online help for the Agile PLM installer.
Portlet Services	Windows/Solaris/Linux/AIX	See the separate <i>Agile Portlet Services Installation and Configuration Guide</i> .
API	Windows/Solaris/Linux/AIX	See online help for the Agile PLM installer.

## Agile PLM Installation Modes

When installing Agile PLM, you can install in Basic or Advanced mode. Basic mode should be selected to install a standalone system on Oracle Application Server with the following system defaults:

- Agile Application Server Virtual Path (default:Agile)
- File Manager User Authentication (default:ifsuser/agile)
- File Manager Virtual Path (default:Filemgr)

If you prefer to use values different from these defaults, then select Advanced mode. In Advanced mode, you can install a standalone or cluster system on Oracle Application Server or BEA WebLogic and change the defaults above, if desired.

## Agile PLM Installation Folders

After you install Agile PLM, the following folders appear in the AGILE\_HOME folder.

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Note	This list includes the folders for all Agile PLM components, although it is not necessary that you install them all on one computer.
------	--

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Folder	Description
agileDomain	Agile Application Server
AgileProxies	Web proxy configuration files
changecast	ChangeCAST client
install	Installation and configuration scripts
integration	Agile Integration Framework (AIF) products such as Agile Integration Services (AIS) and Agile SDK
jdk	Java Development Kit 1.5.0_06
Portlet_51	Agile Portlet Services for WebSphere Portal 5.1.0.2
Tomcat	Tomcat 5.0.30
Uninstaller	Agile PLM uninstaller



## Agile PLM Windows Services

After you install Agile PLM on Oracle Application Server for Windows, the following Windows services are added to your system:

Service	Description
Agile ChangeCAST	Agile ChangeCAST service
Apache Tomcat	Apache Tomcat service. Start this service to start Agile File Manager.
Oracle< <i>instance_name</i> >ProcessManager	Oracle Process Manager service. Start this service to start all Oracle Application Server managed processes, including the Agile Application Server.



# Configuring the Agile Application Server

**This chapter includes the following:**

---

- Overview ..... 17
- Installing Oracle Application Server ..... 17
- Configuring JMS Resources and Deploying the Agile Application ..... 20
- Verifying Your Agile Application Server ..... 21

**Important** When you install and configure the Agile Application Server, follow the sequence recommended in the “Application Server Installation Checklist”.

## Overview

The Agile Application Server is the center of the Agile system, the base for the PLM platform, where all common services and business logic reside for the entire solution. The installation of the Agile Application Server includes the Agile Content Service.

The Agile Application Server runs on Oracle Application Server 10g or BEA WebLogic Server. All client servers and web client users connect to the Application Server either directly or indirectly through a Web proxy server.

---

<b>Note</b>	If you are configuring an application server cluster, go to “Configuring Application Server Clusters” for configuration instructions.
-------------	---

---

## Installing Oracle Application Server

This section provides basic steps for installing Oracle Application Server 10g Release 3 (10.1.3.1.0) SOA Suite. Please see the complete Oracle Application Server installation documentation from Oracle before installing the server.

For an Oracle Application Server cluster, make sure you install Oracle Application Server into the same directory structure on each server in the cluster. Also, all servers in the cluster must use the same operating system. Otherwise, you will be unable to deploy the Agile application to all servers in the cluster.

---

<b>Note</b>	If you are installing Agile PLM on Windows, Oracle Application Server can be installed with the Agile PLM installer. Make sure you have downloaded the Oracle Application Server files to the same machine where the Agile PLM installer is located before starting the installation.
-------------	---

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## Installing a Loopback Adapter

If you are installing Oracle Application Server 10.1.3.1.0 on Windows, a loopback adapter is required in any of these scenarios:

- you are installing on a DHCP computer
- you are installing on a non-networked computer and plan to connect the computer to a network after installation
- you are installing on a network computer (with static IP or DHCP), but you want to be able to run Oracle Application Server after you take the computer off the network.

---

**Note** If you use a loopback adapter to install the application server, you may not be able to connect to your application server with the Java Client from another machine.

---

## Checking If a Loopback Adapter is Installed on Your Computer

To check if a loopback adapter is installed on your computer, run the "ipconfig /all" command:

```
prompt> ipconfig /all
```

If there is a loopback adapter installed, you would see a section that lists the values for the loopback adapter. For example:

```
Ethernet adapter Local Area Connection 2:
  Connection-specific DNS Suffix . . : 
  Description . . . . . : Microsoft Loopback Adapter
  Physical Address. . . . . : 02-00-4C-4F-4F-50
  DHCP Enabled. . . . . : Yes
  Autoconfiguration Enabled . . . . : Yes
  Autoconfiguration IP Address. . . : 169.254.25.129
  Subnet Mask . . . . . : 255.255.0.0
```

## Installing a Loopback Adapter on Windows 2003

**To install a loopback adapter on Windows 2003 or Windows XP:**

1. Open the Windows Control Panel.
2. Double-click Add Hardware to start the Add Hardware wizard.
3. In the Welcome window, click Next.
4. In the Is the hardware connected? window, select Yes, I have already connected the hardware, and click Next.
5. In the The following hardware is already installed on your computer window, in the list of installed hardware, select Add a new hardware device, and click Next.
6. In the The wizard can help you install other hardware window, select Install the hardware that I manually select from a list, and click Next.
7. In the From the list of hardware types, select the type of hardware you are installing window, select Network adapters, and click Next.
8. In the Select Network Adapter window, make the following selections:
  - Manufacturer: select Microsoft.

- Network Adapter: select Microsoft Loopback Adapter.
9. Click Next.
  10. In the The wizard is ready to install your hardware window, click Next.
  11. In the Completing the Add Hardware Wizard window, click Finish.
  12. Restart your computer.
  13. Right-click My Network Places on the desktop and choose Properties to display the Network Connections Control Panel.
  14. Right-click the connection that was just created. This is usually named "Local Area Connection 2". Choose Properties.
  15. On the General tab, select Internet Protocol (TCP/IP), and click Properties.
  16. In the Properties dialog box, click Use the following IP address and do the following:
    - a. IP Address: Enter a non-routable IP for the loopback adapter. Oracle recommends the following non-routable addresses:  
192.168.x.x (x is any value between 1 and 255)  
10.10.10.10
    - b. Subnet mask: Enter 255.255.255.0.
    - c. Record the values you entered, which you will need later in this procedure.
    - d. Leave all other fields empty.
    - e. Click OK.
  17. Click OK in the Local Area Connection 2 Properties dialog.
  18. Close Network Connections.
  19. Restart the computer.
  20. Add a line to the C:\winnt\system32\drivers\etc\hosts file with the following format, right after the localhost line:  
  
`IP_address    hostname.domainname    hostname`  
where:
    - IP\_address is the non-routable IP address you entered in step 16.
    - hostname is the name of the computer.
    - domainname is the name of the domain.

For example:

```
10.10.10.10    mycomputer.mydomain.com    mycomputer
```

## Starting the Oracle Application Server Installation

To install Oracle Application Server 10g Release 3 (10.1.3.1.0) on Windows:

**Log in to the computer as a user who is a member of the Administrators group.**

1. Copy the Oracle Application Server files to your system.
2. Double-click the setup.exe file in the location where you copied the installer files.  
This launches Oracle Universal Installer.

### To install Oracle Application Server 10g Release 3 (10.1.3.1.0) on UNIX:

1. Log in as the user who will own and administer the Agile deployment (for example, the UNIX user "agile").
2. Copy the Oracle Application Server files to your hard drive.
3. Start the installer:  

```
$ <installer_path>/Disk1/runInstaller
```

This launches Oracle Universal Installer.

## Choosing Oracle Application Server Components to Install

When you install Oracle Application Server as a standalone server, choose the Advanced install option and the following components:

- J2EE Server and Web Server

Choose Automatic port configuration, then specify the AS Instance Name, Administrator Username and Password, and OC4J Instance Name. Check the Configure this as an Administration OC4J Instance checkbox. Do not check the cluster topology check box.

**Important** Remember the OC4J Administrator Password. It is required during the Agile PLM application JMS resource configuration and deployment.

For more information, see the complete Oracle Application Server installation documentation.

## What To Do Next

Install the Agile Application Server by starting the Agile PLM installer and following the instructions in online help. See "Installing Agile PLM."

## Configuring JMS Resources and Deploying the Agile Application

After you install the Agile Application Server, you are ready to configure JMS resources and deploy the application.

---

Note	For UNIX operating systems, substitute forward slashes for back slashes in the steps below.
------	---

---

### To deploy the Agile application:

1. Windows: Open a Command Prompt window.  
UNIX: Open a terminal window and log on as the user who installed Oracle Application Server.
2. Restart the Oracle Application Server instance:  

```
oracle_home\opmn\bin\opmnctl stopall  
oracle_home\opmn\bin\opmnctl startall
```
3. Check the status of the Oracle Application Server (OC4JGroup) and HTTP\_Server

components:

oracle\_home\opmn\bin\opmnctl status

Both components should be alive.

4. Run the configuration script to configure the Agile application-related JMS settings:

Windows: \AGILE\_HOME\agileDomain\bin\configure.cmd <OC4Jadmin Password>

UNIX: /AGILE\_HOME/agileDomain/bin/configure.sh <OC4Jadmin Password>

After configuration, messages similar to the following should appear:

```
Creating Topic: Rollup Queue
Command was successful
Creating Topic: sync_topic
Command was successful
JMS Configuration completed.
```

5. Deploy the Agile application:

Windows: \AGILE\_HOME\agileDomain\bin\DeployAgilePLM.cmd <OC4Jadmin Password>

UNIX: /AGILE\_HOME/agileDomain/bin/DeployAgilePLM.sh <OC4Jadmin Password>

6. Check the default\_group~home~default\_group~1.log file in the following directory to verify that the Agile application is deployed:

oracle\_home\opmn\logs\

## What To Do Next

Verify your Agile Application Server. See the next section.

## Verifying Your Agile Application Server

Once the Agile application is deployed, you should verify that the system works before installing other Agile PLM components. The simplest test is to log into Agile Web Client.

Before using Agile Integration Framework (AIF) products such as Agile Integration Services (AIS) or the Agile SDK, you must ensure that the system is properly configured. This involves checking whether Web services and Agile SDK clients can connect successfully to the Agile Application Server. You must also make sure that HTTP ports are configured correctly on your server.

For more information about using AIS and the Agile SDK to develop custom solutions for Agile PLM, see the separate *Agile Integration Services Developer Guide* and the *Agile SDK Developer Guide*, respectively.

## Verifying the Agile Application Server Login

After you deploy the Agile application, test whether you can log in.

**To start the Agile Application Server and test logging in:**

1. Open a Web browser.
2. Test the login using the following URL:

[http://<hostname>.<domain>:<port>/<appserver\\_virtual\\_path>/PLMServlet](http://<hostname>.<domain>:<port>/<appserver_virtual_path>/PLMServlet)

For example, the URL might look something like this:

<http://plmserver.yourcompany.com:7777/Agile/PLMServlet>

---

Note      The URL is case-sensitive.

---

**Important** If you are configuring a separate reverse-proxy web server for the application, then you should NOT provide users with the application server URL. The hostname and port number for the reverse-proxy may be different from the application server and thus the reverse-proxy web server alias and port should be used by Agile Web client end users. The Application Server URL is a direct path to the Application Server, and it should be used only for testing and troubleshooting purposes.

A login window appears.

3. If you have not added Agile PLM users, type admin for the user and agile for the password.

## Checking Whether Agile Web Services Work

Before trying to compile and run the sample AIS web service clients, or developing custom web service extensions to the Agile PLM system, make sure your server is working properly. Try accessing the following URLs to see if they correctly return WSDL from the server.

1. <http://agileserver/virtualPath/integration/ws/Importer?wsdl>
2. <http://agileserver/virtualPath/integration/ws/Export?wsdl>
3. <http://agileserver/virtualPath/integration/ws/ResponseService?wsdl>

All three URLs should return WSDL. If any do not, contact Customer Support.

## Checking Whether the Agile SDK Works

If you purchased a license to the Agile SDK, Agile PLM provides both server-side and client-side components that allow you to develop Java programs and web services that extend the functionality of Agile PLM and help you integrate it with other applications. Before beginning to develop Agile SDK programs, make sure your system is working properly. You should be able to establish a connection with the Agile Application Server or the Web proxy server used for the Agile PLM system. You should also be able to create an Agile PLM session and download classes from the server.

## Checking Your Connection

To check your connection, access the following servlet URL that is installed with Agile PLM:

[http://<servername>.<domain>:<port>/<appserver\\_virtualPath>/ServerAPIProperties](http://<servername>.<domain>:<port>/<appserver_virtualPath>/ServerAPIProperties)

For example, the URL might look something like this:

<http://plm.yourcompany.com/Agile/ServerAPIProperties>

The servlet should return the following information:

- Minimum Agile API version needed to connect to the server
- Current Agile PLM server version
- Current Agile PLM release



- Agile PLM session class
- Agile PLM authenticator class
- Agile PLM application server type
- name/value pairs for environment variables

If the page cannot be found, you are unable to connect to the server. There are several possible causes for the problem:

- You typed the URL incorrectly.
- The server may be down temporarily.
- You may be experiencing problems with your network.

Whatever the cause, you must fix the problem before you can run an Agile SDK client. If you need help, contact your company's Help Desk or your Agile PLM administrator.

## Configuring HTTP Ports Correctly

If you can connect to the server, but your Agile SDK program has trouble creating an Agile PLM session on Oracle Application Server (OAS), it could be because the HTTP server is incorrectly configured. For more information, see [“Configuring Oracle HTTP Server”](#) (on page 24).

## Granting Write Permission to the AgileSDK.cache and sdk.extensions.lib Folders

When you run an Agile SDK client program, it connects to the Agile Application Server and automatically downloads the classes it needs into a local cache folder named AgileSDK.cache. Similarly, when you run a process extension from one of the Agile PLM clients or invoke a web service extension, the server automatically copies any updated libraries into a folder named sdk.extensions.lib before loading them. On Windows, these folders are created automatically in the c:\Documents and Settings\<username> folder and there is never any need to modify them. However, on Unix-based operating systems, the system administrator must create the /tmp/AgileSDK.cache and /tmp/sdk.extensions.lib directories and grant users write access to them.

If you don't have write access to the /tmp/AgileSDK.cache and /tmp/sdk.extensions.lib directories, you won't be able to run Agile SDK client programs, use process extensions from Agile PLM clients, or use Agile PLM web service extensions. Please see your system administrator and make sure you have proper access to those directories.

Alternatively, an Agile SDK client program can programmatically change the location of the AgileSDK.cache directory at run time. For example, you can use the java.io.tmpdir option of the Java Virtual Machine to specify a temp directory where all users have write access.

## Setting the sdk.extensions Property

If your company uses the Agile SDK to develop process extensions or web service extensions, the finished programs are copied to the AGILE\_HOME\integration\sdk\extensions folder located on the Agile Application Server. From there, the server uses special-purpose class loaders to load the programs when they are invoked.

The agile.properties file located in AGILE\_HOME\agileDomain\config contains an sdk.extensions property that specifies the location of the extensions folder. If process extensions or web service

extensions don't run successfully, it could be because the `sdk.extensions` property is set incorrectly and does not match the location where the programs have been placed.

---

Note	Ordinarily, you should never need to edit the <code>agile.properties</code> file. The <code>sdk.extensions</code> property should be set correctly when you install Agile PLM. If you modify the <code>sdk.extensions</code> property, you must restart the server.
------	---

---

## Configuring Oracle HTTP Server

Oracle HTTP Server is a version of the Apache Web Server that is included with your installation of Oracle Application Server. There are several problems that can occur with Agile PLM if Oracle HTTP Server is configured incorrectly. For example, you may have trouble creating an Agile session from an Agile SDK program. Or you may have trouble importing data from the Microsoft Excel-based client. To fix these problems, you must reconfigure the Oracle HTTP Server.

The main configuration file for Oracle HTTP Server is `httpd.conf`. It is located in the following directory:

Windows: `oracle_home\Apache\Apache\conf`

UNIX: `oracle_home/Apache/Apache/conf`

Open the `httpd.conf` file to edit it. You can use any text editor.

Make sure the Port and Listen values in `httpd.conf` are set correctly. The value for Port should reflect the listen port of the reverse-proxy web server (if present) or of Oracle HTTP Server (if no reverse-proxy web server is configured). The value for Listen should reflect the listen port of the Oracle HTTP Server. The value for `ServerName` should reflect the alias or hostname of the reverse-proxy web server (if present) or of Oracle HTTP Server (if no reverse-proxy web server is configured). If no reverse-proxy web server is used, then here is what the Port section of the `httpd.conf` file should look like:

```
# Port: The port to which the standalone server listens.  Certain
firewall
# products must be configured before Apache can listen to a specific
port.
# Other running httpd servers will also interfere with this port.
Disable
# all firewall, security, and other services if you encounter problems.
# To help diagnose problems use the Windows NT command NETSTAT -a
#
Port 7777
Listen 7777
```

---

Note	If port 7777 is already being used, Oracle HTTP Server listens on the next available port number between a range of 7777 and 7877.
------	--

---

Make sure the server status reports section of the `httpd.conf` file uses the fully qualified domain name for your Oracle HTTP Server. Here is what that section should look like:

```
# Allow server status reports, with the URL of http://servername/server-status
# Change the ".your_domain.com" to match your domain to enable.
#
<Location /server-status>
    SetHandler server-status
    Order deny,allow
    Deny from all
    Allow from localhost servername.your_domain.com servername
</Location>
```

**Important** If you modify the httpd.conf file, you must restart Oracle HTTP Server.

## Setting the Temp Directory

When you installed Oracle Application Server, you logged into your operating system as a particular user. You should always log in as that user to manage your installation. Several variables are set in the configuration when you install Oracle Application Server. One of them is the TMP environment variable, which sets the temporary directory that the server uses. On Windows, by default the TMP environment variable for Oracle Application Server is set to the temp directory of the user that installed the software.

Several Agile PLM services use the temporary directory to store temporary files. If you inadvertently delete the temporary directory that Oracle Application Server is using, Agile PLM services that were using the temporary directory may no longer operate successfully.

If you notice that Agile PLM export and import operations are no longer working, check the application server log and see if there is an error like this:

```
Exception msg:java.rmi.RemoteException: An error was encountered while
exporting data: com.agile.util.exception.CMAppException: C:\Documents and
Settings\<user>\Local
Settings\Temp\2\AgilePC9Extract\223673754\223673754.xml (The system cannot find
the path specified)
```

The message confirms that Oracle Application Server can no longer find the temporary directory. To resolve the problem, you can recreate or restore the temp directory, or set the TMP environment variable for Oracle Application Server to another location.

### To reset the temporary directory for Oracle Application Server:

1. Log in as the user used to install Oracle Application Server.
2. Open the opmn.xml file located in the \oracle\_home\opmn\conf directory.
3. Look for the following section:

```
<ias-instance id="instance_name.server_name.domain">
  <environment>
    <variable id="TMP" value=temp_directory />
  </environment>
```

4. Change the *temp\_directory* value to a valid directory. It must be a directory that the user who manages OAS can access and write to.
5. Save the file.
6. Restart Oracle Application Server.

## Recompiling Agile PLM JSP Files

If you have edited Agile PLM JSP files to modify the Agile Web Client user interface, you need to modify the Oracle Application Server main\_mode parameter to make sure the JSP files are recompiled before they are loaded.

For information about how to modify the Agile Web Client user interface, please see your Oracle Consulting - Agile Practice representative.

**To change the main\_mode parameter to recompile:**

1. Windows: Change to the \oracle\_home\j2ee\home\config\ directory.  
UNIX: Change to the /oracle\_home/j2ee/home/config/ directory.
2. Edit the global-web-application.xml file. Change the value of the main\_mode parameter to recompile, as follows:

```
<init-param>  
    <param-name>main_mode</param-name>  
    <param-value>recompile</param-value>  
</init-param>
```

# Configuring Application Server Clusters

**This chapter includes the following:**

---

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## About Agile Application Server Clusters

Agile takes advantage of clustering capability provided by the supported application servers. A cluster is a group of servers that work together to provide a more scalable, more reliable application platform than a single server. A cluster appears to its clients as a single server, but is actually a group of servers acting as one. A cluster provides two key advantages over a single server:

- **Scalability:** The capacity of a cluster is not limited to a single server or a single machine. New servers can be added to the cluster dynamically to increase capacity. If more hardware is needed, a new server on a new machine can be added. If a single server cannot fully utilize an existing machine, additional servers can be added to that machine. But this is not a supported configuration unless you are using a product like VMWare or partitions or containers.
- **High-Availability:** A cluster uses the redundancy of multiple servers to insulate clients from failures. The same service can be provided on multiple servers in the cluster. If one server fails, the surviving members can continue to serve the application. The ability to fail over from a failed server to a functioning server increases the availability of the application to clients.

Traffic to multiple application servers needs to be managed or balanced by some device in-between the server cluster and the clients. There are two main components that provide this capability; reverse-proxy web servers or load balancing hardware.

## Choosing Oracle Application Server Components to Install

You must have at least two servers to install an application server cluster. One server acts as the primary server and the other acts as the secondary server. The directory structure should be the same on both servers.

Oracle Application Server must be installed on the primary and secondary server before you install any Agile components. For information on how to install Oracle Application Server, see “Installing Oracle Application Server”.

Make sure that the OC4J administrator password for Oracle Application Server is the same on all servers in the cluster.

For more information, see the complete Oracle Application Server installation documentation from Oracle.

## Installing Agile PLM on the Primary Server

Install the Agile Application Server by starting the Agile PLM installer and following the instructions in online help. See “Installing Agile PLM.”

During the installation, make sure the following steps are performed:

1. Select Advanced Mode on the Installation Mode panel.
2. Select Cluster installation on the Installation Type panel.
3. Enter the multicast address and port number which are used as a part of the dynamic discovery mechanism for managing Oracle nodes in a cluster environment.

---

Note	All of the nodes in the cluster topology must be configured to use the same multicast address and port number.
------	--

---

4. Select Primary Server on the Clustered Application Server Type panel.
5. If installing File Managers that are to be load-balanced, make sure the file manager storage location is a shared location for the primary and secondary server.

## Installing Agile PLM on the Secondary Server

Install the Agile Application Server by starting the Agile PLM installer and following the instructions in online help. See “[Installing Agile PLM](#) (on page 9).”

During the installation, make sure the following steps are performed:

1. Select Advanced Mode on the Installation Mode panel.
2. Select Cluster installation on the Installation Type panel.
3. Enter the multicast address and port number which are used as a part of the dynamic discovery mechanism for managing Oracle nodes in a cluster environment.

---

Note	All of the nodes in the cluster topology must be configured to use the same multicast address and port number.
------	--

---

4. Select Secondary Server on the Clustered Application Server Type panel.
5. If installing File Managers that are to be load-balanced, make sure the file manager storage location is a shared location for the primary and secondary server.

## Configuring the Primary and Secondary Servers

The following steps must be performed on each server in the cluster before the application is

deployed:

1. Start the application server instance:  
`oracle_home\opmn\bin\opmnctl startall`
2. Check the status of the Oracle Application Server instance:  
`oracle_home\opmn\bin\opmnctl status`  
 The HTTP\_Server and OC4J components of Oracle Application Server should be alive.
3. In a Command Prompt window, go to the AGILE\_HOME\agileDomain\bin directory and run the joinCluster command.  
 This command joins the instance into the cluster.

## Configuring JMS Resources and Deploying the Agile Application in a Cluster

After the Agile PLM application server has been installed on the primary and secondary servers, you can now deploy the Agile application. You should deploy Agile on the primary server. It is automatically synchronized to the secondary servers in the cluster.

Before deploying the application, make sure the following actions are taken:

- Stop Oracle Application Server. Make sure that the network adapter is configured on your LAN and that the other cluster members are accessible via 'ping'.
- On Windows, disable the loopback adapter and remove its IP address from the hosts file.
- Verify that the database schema is upgraded to Agile PLM 9.2.2.4.
- Verify that the HTTP\_Server and OC4J components are alive on the primary and secondary servers.

Note	For UNIX operating systems, substitute forward slashes for backward slashes in the following steps.
------	---

### To deploy the Agile application:

1. Windows: Open a Command Prompt window on the primary server.  
 UNIX: Open a terminal window on the primary server and log on as the user who installed Oracle Application Server.
2. Run the `configure` script to configure JMS resources for the Agile application:  
 Windows: `\AGILE_HOME\agileDomain\bin\configure.cmd <OC4Jadmin Password>`  
 UNIX: `/AGILE_HOME/agileDomain/bin/configure.sh <OC4Jadmin Password>`  
 After configuration, the messages similar to the following should appear:  

```
Creating Topic: Rollup Queue
Command was successful
Creating Topic: sync_topic
Command was successful
JMS Configuration completed.
```
3. Deploy the Agile application:

Windows: \AGILE\_HOME\agileDomain\bin\DeployAgilePLM <OC4Jadmin Password>

UNIX: /AGILE\_HOME/agileDomain/bin/DeployAgilePLM.sh <OC4Jadmin Password>

The application should be deployed on the primary and secondary servers.

4. Check the default\_group~home~default\_group~1.log file in the following directory to verify that the Agile application is deployed:

\oracle\_home\opmn\logs\

5. Restart the Oracle Application Server instance on all servers:

\oracle\_home\opmn\bin\opmnctl stopall

\oracle\_home\opmn\bin\opmnctl startall

## What To Do Next

Configure a load balancer or a reverse-proxy web server for your Agile PLM cluster. For more information, see “Configuring the Load Balancer” and “Configuring a Web Proxy Server for Agile PLM.”

## Configuring the Load Balancer

A load balancer is deployed to balance user load across a cluster and to avoid directing traffic to a downed cluster member. When external users need access to Agile, this device is deployed in the DMZ. The load balancer does not need to be installed in the DMZ if Agile PLM is only accessed internally from within the corporate firewall. Load balancers can be used with the Java Client and the Web Client.

To configure a load balancer:

- Configure three virtual IP addresses, one for the application server web client (port 7777 by default), one for the application server Java client (port 23791, internal users only), and one for the File Manager (port 8080 by default).
- Set the load balancer policy to Round-robin.

To access the system after you have configured the load balancer, use an alias for the virtual IP address of the load balancer in the Agile web and Java client URLs. The following URL is an example:

<http://loadbalancer.mydomain.com/Agile/PLMServlet>

or

ormi://loadbalancer.mydomain.com/Agile

## Configuring jndiurl.properties and pcclient.jnlp

---

**Important** This section only applies to clustered Agile PLM systems on UNIX that use a Web proxy server (Apache) instead of a load balancer.

---



**To configure jndiurl.properties and pcclient.jnlp on secondary servers:**

1. Stop the Web proxy server.
2. Stop Oracle Application Server on each server in the cluster.
3. On each secondary server, open the following file in a text editor:  
`/oracle_home/j2ee/home/applications/APP-INF/classes/jndiurl.properties`
4. Edit the URL to point to the secondary server:  
`server2=ormi://<secondary_server_hostname>.<domain>/Agile`  
where
  - `<secondary_server_hostname>` is the hostname for the secondary server.
  - `<domain>` is the fully qualified domain name.
5. Save the jndiurl.properties file.
6. On each secondary server, open the following file in a text editor:  
`/oracle_home/j2ee/home/applications/Agile/JavaClient/pcclient.jnlp`
7. Find the following tags and edit the values listed below:  
`serverURL:`  
`<argument>serverURL=ormi://<secondary_server_hostname>.<domain>/Agile</argument>`  
where
  - `<secondary_server_hostname>` is the hostname for the secondary server.
  - `<domain>` is the fully qualified domain name.
8. Save the file.
9. Start the Oracle Application Server on each server in the cluster.
10. Start the Web proxy server.

## Starting the Agile Cluster

Once the Agile application is deployed to every Oracle Application Server in the cluster, the cluster should be active. You can use the `opmnctl` command-line interface to stop and start individual servers in the cluster.

## Testing the Agile Cluster

Use the following URLs to test each server in the cluster and the load balancer:

### Web Client

[http://hostname.domain.com:<port\\_no>/<app-serverVirtualPath>/PLMServlet](http://hostname.domain.com:<port_no>/<app-serverVirtualPath>/PLMServlet)

For example, if your hosts are named `host1`, `host2`, and `host3`, the Web Client URLs could look like this:

<http://host1.mydomain.com:7777/Agile/PLMServlet>

<http://host2.mydomain.com:7777/Agile/PLMServlet>

<http://host3.mydomain.com:7777/Agile/PLMServlet>

## Java Client

[http://hostname.domain.com:<port\\_no>/JavaClient/start.html](http://hostname.domain.com:<port_no>/JavaClient/start.html)

For example, if your hosts are named host1, host2, and host3, the Java Client URLs could look like this:

<http://host1.mydomain.com:7777/JavaClient/start.html>

<http://host2.mydomain.com:7777/JavaClient/start.html>

<http://host3.mydomain.com:7777/JavaClient/start.html>

## Load Balancer

If you use a load balancer for your application server cluster, test the entire system by going to the load balancer URLs for Web Client and Java Client:

<http://loadbalancer.domain.com/Agile/PLMServlet>

<http://loadbalancer.domain.com/JavaClient/start.html>

## Configuring the JNLP MIME Type on UNIX

A JNLP file is an XML document that describes a Java application to be launched by Java Web Start. To successfully download and install applications using Java Web Start, you must configure the JNLP MIME type for your server.

Add the following line to the mime.types file in the /oracle\_home/Apache/Apache/conf directory of each application server in the cluster:

```
application/x-java-jnlp-file      JNLP
```

# Configuring the File Manager

**This chapter includes the following:**

---

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## About File Management

The File Manager manages files in a repository or vault in the file system. A File Manager provides a place to store and retrieve files locally or remotely. The File Manager can be installed on the same machine as the Agile Application Server or on a separate machine. The server can also be installed in a cluster or distributed across geographic regions.

The Agile Viewer communicates with the File Manager which in turn makes calls to the Agile Application server using the HTTP protocol. Because of this, if Agile View Server is licensed, it is recommended that the Agile View Server be installed on the same machine as the Agile File Manager, if sufficient resources are available.

In the preferred clustered environment, File Managers run on each application server node managing a shared drive. In a distributed environment, files are stored locally for efficient downloads and uploads. If a file is not found on a local file manager, the file is replicated from the primary file manager. The primary file manager is the file manager that is local to the application server.

## Distributed File Managers

Multiple Agile File Managers can be deployed in a distributed configuration with or without a reverse-proxy web server (Microsoft IIS or Apache HTTP Server) in the DMZ. A Distributed File Manager configuration allows you to install additional file managers at remote locations so that remote sites can store and retrieve files locally, while still making the files available to the Agile PLM system. This can reduce the download time by placing file managers close to remote clients.

The determination for using distributed file management is based on your Agile end-user locations and network configuration. In general, the following criteria can help you to determine if you need additional file managers:

- Multiple remote locations  
If you have multiple remote sites connected over a WAN, clients at remote locations who need to store and retrieve files from the main file manager can experience large time delays.
- Reducing inter-network traffic  
If your network is divided into subnets to reduce network traffic, then you should consider putting a file manager in each subnet that contains Agile users to reduce your intersubnet

network traffic.

The usage model for a distributed file manager configuration is as follows:

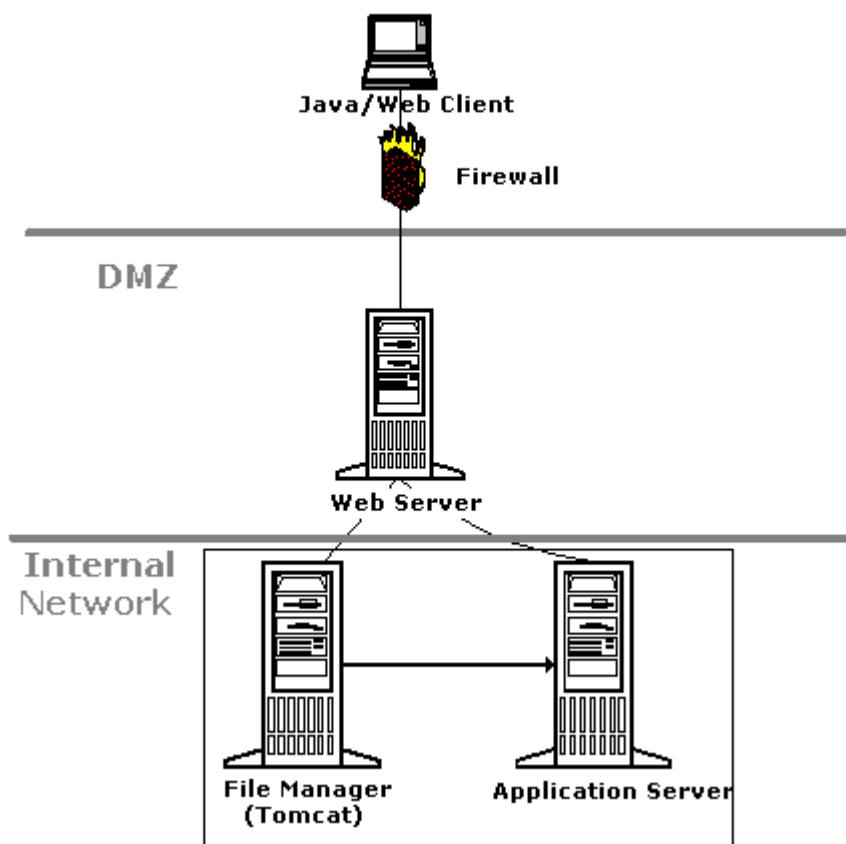
- The File Manager located nearest to the application server should be designated the primary File Manager.
- Users upload and download files from their preferred File Manager.
- File replication between File Managers is on-demand. When a remote user requests a file that does not exist on their preferred File Manager, the system copies the file to the remote user's preferred File Manager.
- Checking out and checking in files is the same as adding and getting files.
- Viewing a file or viewing a redline file is similar to getting a file.
- Redlining a file is the same as adding a file.
- Deleting a file only removes references to the file. Use the vault utility to clean up additional files on non-primary file managers.

## Deployment Configurations

You can deploy the File Manager in either a standalone or cluster configuration.

## Standalone

The following figure shows a single server standalone deployment configuration. The web server in the DMZ forwards calls to the Application Server as well as the File Manager.

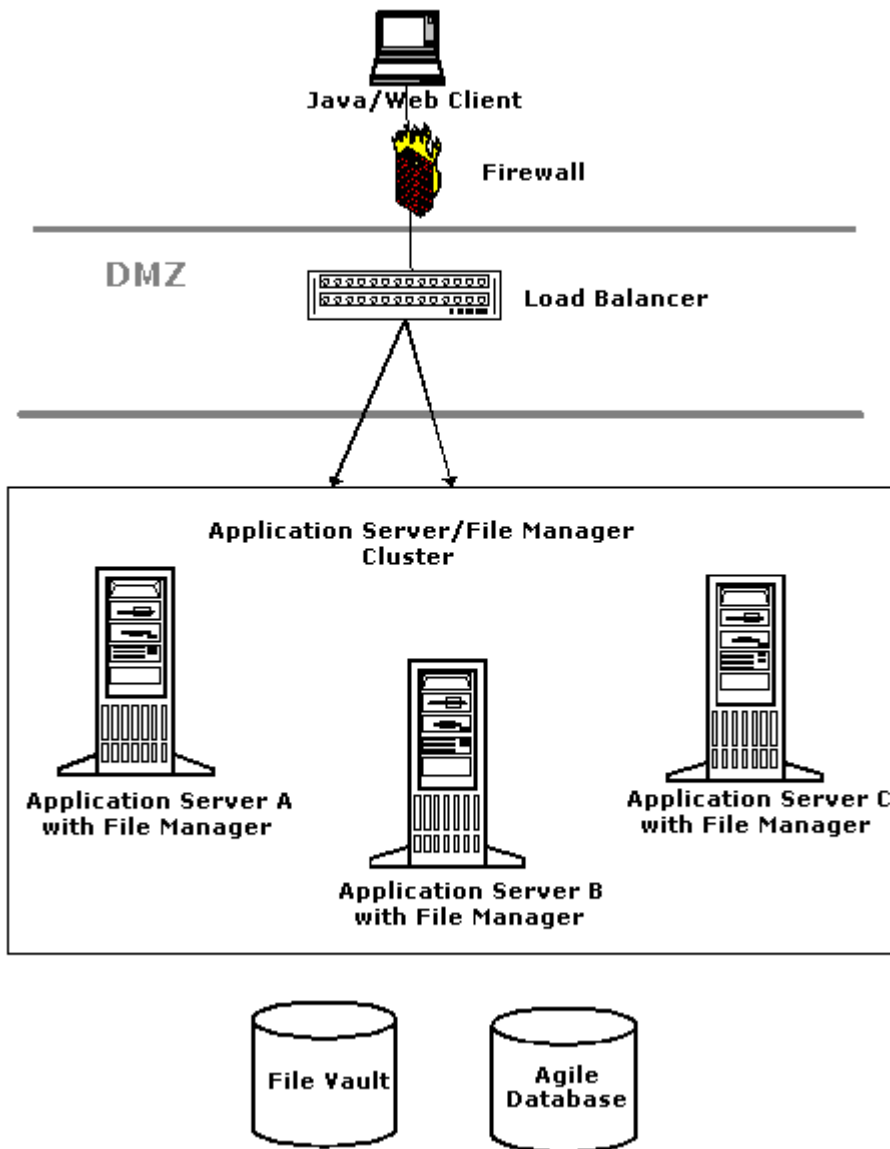


If you plan to install the Application Server and File Manager on the same box (co-deploy), choose both components during Agile PLM installation.

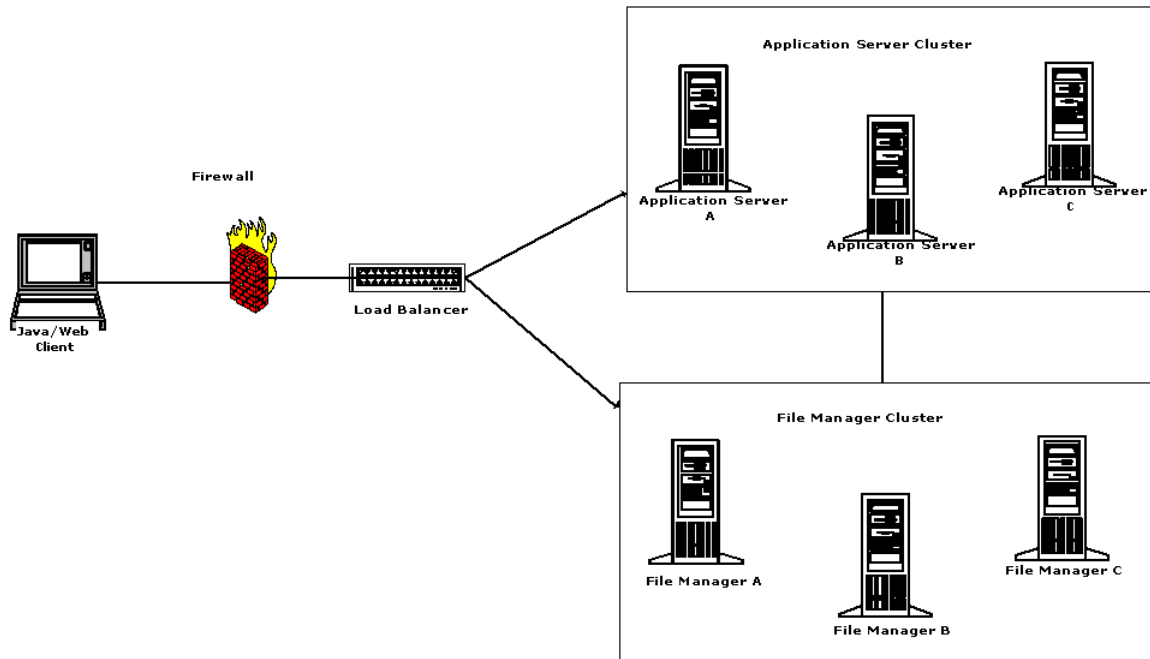
## Cluster

The preferred cluster deployment configuration is shown in the following figure. Each node in the cluster has the Application Server and File Manager deployed. File Managers have a shared disk for file vaults. Each File Manager communicates with the local application server for optimized performance. The File Managers join in a Tomcat cluster to support failovers. The Load Balancer exposes two virtual IP addresses, one for the application server and one for the File Manager.

When installing this type of cluster, choose both the Application Server and File Manager components during Agile PLM installation before selecting the Cluster configuration.



You can also choose to deploy the File Manager cluster and Application Server cluster on separate machines, but that configuration requires more hardware. If you choose to install this type of setup, the Application Servers and File Managers should be installed separately before configuring and validating.



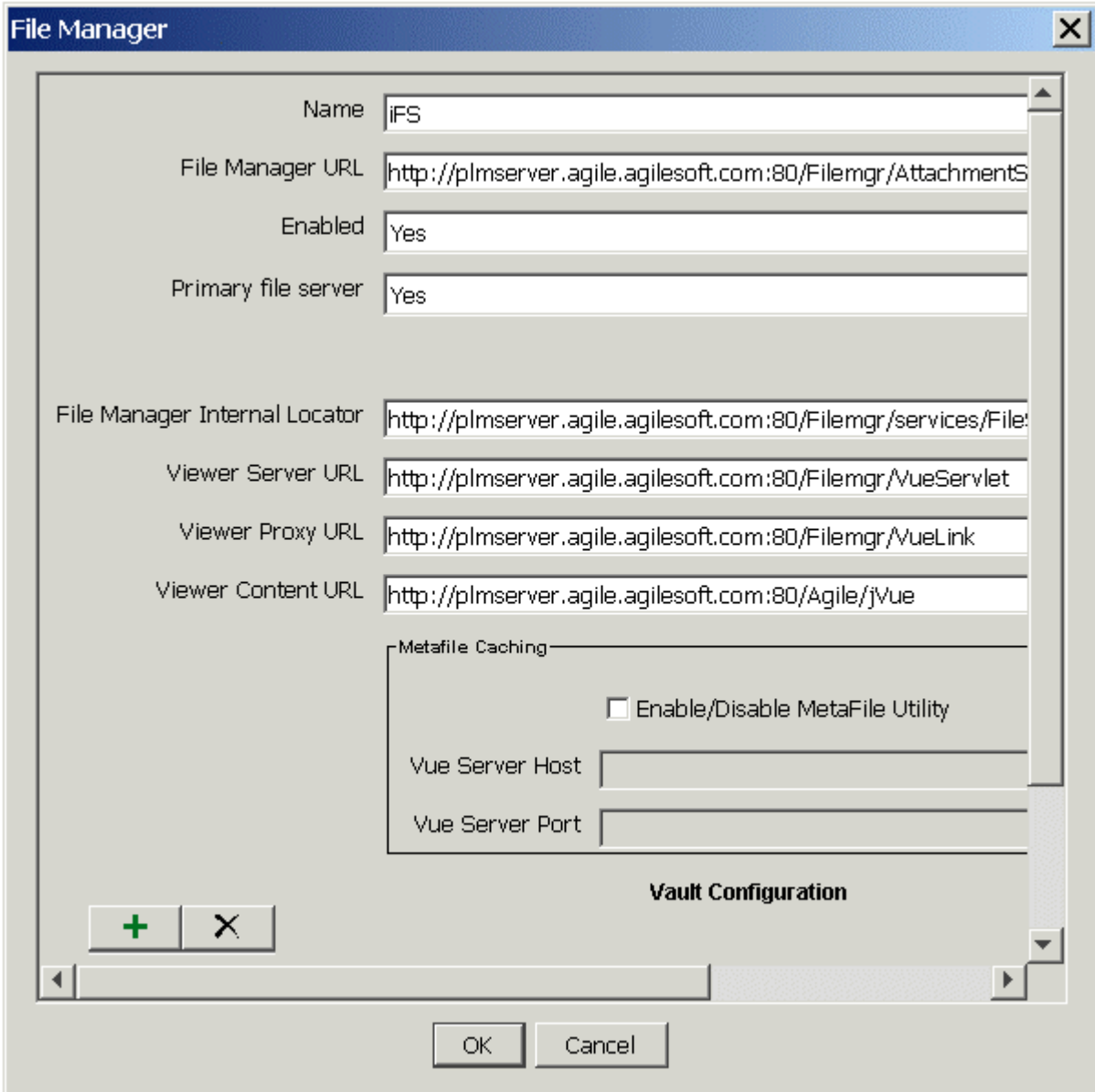
## Configuring the File Manager

After installing the File Manager and setting up a load balancer or reverse-proxy server for it, you must configure the File Manager settings in the Java Client.

<b>Note</b>	Before configuring the File Manager, make sure you set up a load balancer or reverse-proxy server.
-------------	--

### To configure File Manager settings:

1. Start the Agile Application Server.  
`oracle_home\opmn\bin\opmnctl startall`
2. Start the Agile Java Client, as described in "[Installing and Configuring Agile Java Client](#) (on page 75)".
3. Log in as an Agile Administrator user.
4. Click the Admin tab.
5. Choose Server Settings > Locations. The Server Location window appears.
6. Click the File Manager tab to bring it forward.
7. double-click the entry to display the File Manager dialog box.
8. Click the Advanced button and check the Viewer Content URL.



The image shows a 'File Manager' configuration window. It contains several text input fields and checkboxes. The fields are: Name (IFS), File Manager URL (http://plmserver.agile.agilesoft.com:80/Filemgr/AttachmentS), Enabled (Yes), Primary file server (Yes), File Manager Internal Locator (http://plmserver.agile.agilesoft.com:80/Filemgr/services/File:), Viewer Server URL (http://plmserver.agile.agilesoft.com:80/Filemgr/VueServlet), Viewer Proxy URL (http://plmserver.agile.agilesoft.com:80/Filemgr/VueLink), and Viewer Content URL (http://plmserver.agile.agilesoft.com:80/Agile/jVue). There is a 'Metafile Caching' section with a checkbox 'Enable/Disable MetaFile Utility' which is unchecked. Below this are fields for 'Vue Server Host' and 'Vue Server Port'. At the bottom right, there is a 'Vault Configuration' section. The window has a title bar with a close button (X) and a scroll bar on the right. At the bottom are 'OK' and 'Cancel' buttons.

Name	IFS
File Manager URL	http://plmserver.agile.agilesoft.com:80/Filemgr/AttachmentS
Enabled	Yes
Primary file server	Yes
File Manager Internal Locator	http://plmserver.agile.agilesoft.com:80/Filemgr/services/File:
Viewer Server URL	http://plmserver.agile.agilesoft.com:80/Filemgr/VueServlet
Viewer Proxy URL	http://plmserver.agile.agilesoft.com:80/Filemgr/VueLink
Viewer Content URL	http://plmserver.agile.agilesoft.com:80/Agile/jVue
Metafile Caching <input type="checkbox"/> Enable/Disable MetaFile Utility	
Vue Server Host	
Vue Server Port	
Vault Configuration	

OK Cancel

9. Enter the value of the File Manager URL.

The File Manager URL is the URL the Agile Web Client connects to. The format is:

[http://<proxy/loadbalancer>:<port>/<fileserver\\_virtual\\_path>/AttachmentServlet](http://<proxy/loadbalancer>:<port>/<fileserver_virtual_path>/AttachmentServlet)

10. Click the Standard Vault Type to display the drop-down list.

You can choose to have Standard or Custom vault. A standard vault is the default vault type that contains the new files and redlines, while a custom vault allows you to attach a disk of data to Agile PLM as-is without reorganizing the files. A custom vault is always set up as read-only.

You can attach an arbitrary file structure to the File Manager without the files being uploaded.



Refer to the *Agile PLM Import and Export Guide* for more information on how to configure FileLoad for custom vaults.

11. Enter a description of the vault in the Description field.
12. Verify that the primary location where the files are stored in the Base Storage Directory field is the same location you entered during installation. The default location is \files. The location can be a shared network storage directory, such as a Storage Area Network (SAN).

**Important** Do not specify a mapped drive which may not be mapped automatically after a reboot. Instead, specify a local drive or UNC name including directory path, like this:

[\\fileserver\filevault](#)

13. Enter a location where the purged (deleted) files are automatically moved in the Purge Directory field. The default location is \files\purge. The location can be a shared network storage directory, such as a Storage Area Network (SAN).


**Important** Do not specify a mapped location. Instead, specify a local drive or UNC name including directory path, like this:

[\\fileserver\filevault\purge](#)

14. Set the vault as Read-Write or Read-Only from the Category drop-down list. Each File Manager can have only one Read-Write vault.

If you have multiple vaults, then the additional vaults should be defined as Read-Only vaults.



15. Click the plus-sign  to add additional vaults.
16. Click OK when done.
17. Start the File Manager (Tomcat). For instructions, see the next section, “Starting the File Manager.”

There are additional configuration settings used to fully configure File Manager through the Java Client. These settings are:

- Filename Prefix (Preferences)
- Checksum computation (Preferences)
- DFM Optimized Replications (Preferences)

For more information on these additional settings, see the *Agile PLM Administrator Guide*.

## Reconfiguring File Manager After Setting Up a Web Proxy Server

If you set up a Web proxy server for Agile File Manager that is different from the server or port you specified when you installed Agile PLM, you must make sure that File Manager points to the proxy server on the correct port. Otherwise, File Manager may not start successfully and Agile PLM clients won't be able to access file attachments.

For instructions on setting up a Web proxy server for File Manager, see “Configuring a Web Proxy Server for Agile PLM.”

**To configure File Manager after setting up a Web proxy server:**

1. Configure File Manager locations in Java Client. See "[Configuring the File Manager](#) (on page 33)".
2. Stop the File Manager.
3. Backup the existing File Manager configuration:
  - a. Change to the `AGILE_HOME\Tomcat\webapps` directory.
  - b. Verify there is a directory named `Filemgr` under the `webapps` directory.
  - c. If the `Filemgr` directory exists, then perform the following:

```
cd ..
```

```
mkdir webapps.old
```

```
Windows: move webapps\Filemgr webapps.old
```

```
UNIX: mv webapps/Filemgr webapps.old
```

4. Create a backup of the `AGILE_HOME\agileDomain\applications\webfs.war` file.
5. Create an empty temporary directory. Make sure there are no spaces in the path to the temporary directory.
6. Copy the `webfs.war` file to the temporary directory.
7. From a command line, change to the temporary directory and run the following commands:

```
set PATH=\AGILE_HOME\jdk\bin;%PATH%
jar -xvf webfs.jar
```
8. After the files are extracted, change to the `WEB-INF\classes\com\agile\webfs\configuration` directory.
9. Using a text editor, open the `server.conf` file for File Manager.
10. Find the `file.server.url` entry, and update it to reflect the proxy server hostname or alias and port number. After you modify the `file.server.url` entry, it should look something like this:

```
file.server.url =http://webserver.company.com:80/Filemgr/services/FileServer
```

---

Note	The <code>file.server.url</code> entry must match the File Manager Internal Locator entry (defined in Java client: Server Settings > Locations) or the File Manager will not initialize successfully.
------	---

---

11. Save the `server.conf` file.
12. Delete the `webfs.war` file from the temporary directory.
13. From a command line, run the following command to recreate the `webfs.war` file:

```
jar -cvf webfs.war *
```
14. Copy the newly created `webfs.war` file to the `\AGILE_HOME\agileDomain\applications` directory.
15. Perform steps 4-14 on the `\AGILE_HOME\Tomcat\server\lib\agile-sso.jar` file. Make sure you create a backup of the `agile-sso.jar` file.
16. Copy the newly created `agile-sso.jar` file to the `\AGILE_HOME\tomcat\server\lib` directory.
17. Restart the File Manager (Tomcat).

## Starting the File Manager

After you have configured the File Manager, you can start the server.

### To start the File Manager on Windows:

1. Choose Start > Administrative Tools > Services.
2. Start the Apache Tomcat service.

You can check for errors in the stdout and stderr logs in the *AGILE\_HOME*\Tomcat\logs directory.

### To start the File Manager on UNIX:

1. Open a terminal window.
2. Change to the /opt/AGILE\_HOME/Tomcat/bin directory.
3. Set and export the JAVA\_HOME variable on the command line:  
    > JAVA\_HOME=/opt/AGILE\_HOME/jdk  
    > export JAVA\_HOME
4. Start the File Manager:  
    > ./startup.sh

## Validating the File Manager Installation

To verify that the File Manager installed successfully, check the following URL:

[http://<fileserver\\_host>:<port>/<fileserver\\_virtual\\_path>/Configuration](http://<fileserver_host>:<port>/<fileserver_virtual_path>/Configuration)

For example, you might type the following URL:

<http://filevault.mycompany.com:8080/Filemgr/Configuration>

If you are using a Web proxy server for File Manager, the URL might look like this:

<http://webproxy.mycompany.com:80/Filemgr/Configuration>

After a moment, the File Manager Configuration page should display. This page tests the File Manager and Application Server connections. If Success is listed in the Status column for all connections, your installation was successful.



# Configuring a Web Proxy Server for Agile PLM

**This chapter includes the following:**

---

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**Important** When you configure a Web proxy server for Agile PLM, follow the sequence recommended in “[Web Proxy Server Installation Checklist](#) (on page 4)”.

## Overview

The Agile Web client is a fully functional Web interface that allows Agile-enabled manufacturers to securely provide internal users and trusted supply chain partners access to Agile PLM.

To connect to the Agile Web Client on a Web proxy server, Agile Web proxy files must be installed on the Web server. Agile Web Client uses Microsoft Internet Information Services (IIS) or Apache Web Server. The Agile Web client connects to an Agile Application Server in the same manner as all other Agile Application Server clients. Secure access is maintained using SSL encryption with HTTPS and is recommended for the Internet. Standard firewall configurations are supported by the Web server.

---

<b>Note</b>	If you are using an Oracle Application Server cluster on Windows, you must use a load balancer instead of a Web proxy server to balance user load across the cluster.
-------------	---

---

## Agile Internet Security

A Web browser uses the Agile Web client to communicate with the Agile Application Server over the Internet using the HTTPS protocol, which uses the Secure Sockets Layer (SSL) protocol. SSL is a standard Internet connection-based protocol for secure communications.

## Recommended Security Practices

It is important that you change all default passwords for both Agile PLM and the database. In addition, users should change their passwords at least every 30 days.

## Configuring Internet Information Server

Before you install Agile Web proxy files on Windows, a Microsoft Internet Information Server (IIS) must be installed on the same computer. In addition, IIS must be configured as follows:

1. Choose Start > Administrative Tools > Internet Information Services (IIS) Manager, and create a new web site called Agile PLM Web Site. For more information on how to create a web site, see the Internet Information Server documentation online at the Microsoft TechNet: <http://technet.microsoft.com/>

---

Note	Due to security vulnerabilities, we recommend that you don't use the Default Web Site installed with Internet Information Server. You can either delete or disable the Default Web Site.
------	--

---

2. Right-click the Agile PLM Web Site, and choose Properties from the shortcut menu.
3. Select the Directory Security tab and click Edit for Anonymous Access and Authentication Control.
4. Make sure Enable Anonymous Access is checked.
5. Uncheck Integrated Windows authentication.
6. Click OK.

Also, search the [\\winnt\system32 folder for the wininet.dll](#) file. The file must be at least version 5.00.2919.6305 or later. Install at least Internet Explorer version 5.00.2919.6305 to update the DLL file.

For security reasons, Agile recommends installing Agile Web proxy files on a server separate from other Agile PLM servers.

## Firewall Configuration

An external user typically runs the Agile Web client in a browser from outside the corporate network. The client typically communicates over the Internet to the Agile servers behind a corporate firewall.

If you want to use HTTPS, firewalls must be configured to allow for connectivity from the Agile Web clients to the DMZ reverse-proxy web server or load balancer and from the DMZ reverse-proxy web server or load balancer to the Agile PLM Application Servers and File Managers.

The corporate firewall on the Agile application side must be configured to allow:

- Incoming HTTPS connections from the Internet to the Web server
- Outgoing TCP/IP connections from the Web server to the Application Server

**Important** On Windows, encryption is supported only between IIS and the client's browser, not between IIS and the Application Server. Do not put a certificate on the Application Server.

## Configuring IIS as a Proxy Server for Agile PLM

When you install the Agile PLM Web Proxies component, the setup program creates the AGILE\_HOME\AgileProxies folder. For example, if you accepted the default installation location at D:\Agile\Agile9224, the AgileProxies folder appears in that folder. The AgileProxies folder contains

the following files that enable communication between the IIS Web server and the Agile Application Server:

- oracle\_proxy.dll — an ISAPI filter, which allows IIS to process HTTP requests
- 9ias.conf — initialization file to direct the proxy filters where to route the HTTP/HTTPS traffic specific to Agile PLM from IIS

---

Note	Make sure you can successfully ping the Application Server using the fully qualified host name and that the HTTP port that the Application Server is listening on is not blocked by a firewall.
------	---

---

#### **To configure IIS to be a Web proxy server for Agile PLM:**

1. On the Web server computer, Choose Start > Administrative Tools > Internet Information Services (IIS) Manager.

The Internet Information Services Manager window appears.

2. Expand the folder for Internet Information Services > servername.
3. right-click the Agile PLM Web Site, and choose Properties from the shortcut menu.

The Agile PLM Web Site Properties dialog box appears.

---

Note	Due to security vulnerabilities, we recommend that you don't use the Default Web Site installed with Internet Information Server and instead create a new Web site named Agile PLM Web Site. For more information, see "Configuring Internet Information Server".
------	---

---

4. Click the Home Directory tab.
5. Set the permissions to Scripts and Executables.
6. Select the ISAPI Filters tab.
7. Click Add.
8. Type oproxy in the Filter Name field.
9. Click Browse and locate the oracle\_proxy.dll file from \AGILE\_HOME\AgileProxies folder. After you select the oracle\_proxy.dll file, click Open to close the dialog box.
10. In the Add/Edit Filter Properties dialog box, Click OK.

The Add/Edit Filter Properties dialog box appears.

11. Click OK to close the Agile PLM Web Site Properties dialog box.
12. right-click the Agile PLM Web Site, and choose New > Virtual Directory from the shortcut menu.

The Virtual Directory Creation Wizard appears.

13. Click Next.
14. Type oproxy in the Alias field. Click Next.
15. On the Web Site Content Directory page, click Browse, locate the \AGILE\_HOME\AgileProxies folder, and then Click OK. Click Next.
16. Check the Execute checkbox. Click Next.
17. Click Finish.

18. Select the Web Service Extensions folder.
19. Select All Unknown ISAPI Extensions.
20. Click Allow.
21. Close IIS Manager.
22. Restart IIS.

---

Note	To restart IIS, stop all of the IIS services through the control panel and then restart them, or restart the computer. This ensures that the .dll is reloaded. Do not use IIS Manager to restart IIS.
------	---

---

## Testing the Configuration

After you set up the oproxy ISAPI filter, you should test whether the filter loads successfully.

**To make sure the oproxy filter added to ISAPI Filters tab is loaded properly on the Web server:**

1. Type the Application Server PLMServlet URL into a browser (using the reverse-proxy web server alias or hostname and listen port) and make sure the Agile PLM login page loads successfully.
2. Select the Agile PLM Web Site node, right-click, and choose Properties from the shortcut menu.

The Agile PLM Web Site Properties dialog box appears.

3. Select the ISAPI Filters tab.

The status for the oproxy filter shows an arrow pointing up, indicating that it is loaded on the IIS Web server and ready to proxy all external HTTP/HTTPS requests to the Agile Web client server.

---

Note	If the arrow is not pointing up, the filter is not loaded properly. In that case, restart the computer.
------	---

---

The IIS Web server is now ready to accept all external Agile Web clients using HTTP requests on standard ports 80. The IIS Web server provides a proxy to the application server running Agile Web clients on the port you specified during the Agile Application Server installation.

## Configuring IIS as a Proxy Server for Agile File Manager

When you install Agile Web proxies, the setup program creates the AGILE\_HOME\AgileProxies folder. For example, if you accepted the default installation location at D:\Agile\Agile9224, the AgileProxies folder appears in that folder.

The AGILE\_HOME\AgileProxies folder contains the following files that enable communication between the IIS Web server and the File Manager (Tomcat):

- isapi\_redirect.dll - The IIS server plugin.
- workers.properties - A file that describes the hosts and ports used by Tomcat processes.
- uriworkemap.properties - A file that maps URL-Path patterns to Tomcat processes.



---

**Note** If you set up a Web proxy server for Agile File Manager that is different from the server or port you specified when you installed Agile PLM, you must make sure that File Manager points to the proxy server on the correct port. For more information, see [“Reconfiguring File Manager After Setting Up a Web Proxy Server”](#) (on page 39).

---

**To configure IIS as a proxy server for File Manager:**

1. On the File Manager computer, open the AGILE\_HOME\Tomcat\conf\jk2.properties file.
2. Add the following entry, replacing @AJP-PORT@ with the actual AJP port number:  
[channelSocket.port=@AJP-PORT@](#)

---

**Note** To see which AJP port number to enter, open the AGILE\_HOME\Tomcat\conf\server.xml file and look for the following section:

---

```
<!-- Define a Coyote/JK2 AJP 1.3 Connector on port 8009 -->
<Connector port="8009" enableLookups="false" redirectPort="8443" debug="0"
protocol="AJP/1.3" />
```

3. On the Web server computer, Choose Start > Administrative Tools > Internet Information Services (IIS) Manager.

The Internet Information Services Manager window appears.

4. Expand the folder for Internet Information Services > servername.
5. right-click the Agile PLM Web Site, and choose Properties from the shortcut menu.

The Agile PLM Web Site Properties dialog box appears.

---

**Note** Due to security vulnerabilities, we recommend that you don't use the Default Web Site installed with Internet Information Server and instead create a new Web site named Agile PLM Web Site. For more information, see “Configuring Internet Information Server”.

---

6. Select the ISAPI Filters tab.
7. Click Add.  
The Add/Edit Filter Properties dialog box appears.
8. Type Jakarta IIS Connector in the Filter Name field.
9. Click Browse and locate the isapi\_redirect.dll file from the AGILE\_HOME\AgileProxies folder. After you select the isapi\_redirect.dll file, click Open to close the dialog box.
10. In the Add/Edit Filter Properties dialog box, Click OK.  
The Agile PLM Web Site Properties dialog box appears.
11. Click OK to close the Agile PLM Web Site Properties dialog box.
12. right-click the Agile PLM Web Site, and choose New > Virtual Directory from the shortcut menu.  
The Virtual Directory Creation Wizard appears.
13. Click Next.
14. On the Virtual Directory Alias page, type Jakarta as the alias name. Click Next.
15. On the Web Site Content Directory page, click Browse, locate the AGILE\_HOME\AgileProxies folder, and then Click OK. Click Next.

16. On the Access Permissions page, make sure the Execute checkbox is checked. Click Next.
17. Click Finish.
18. Close IIS Manager.
19. Open the workers.properties file in the AGILE\_HOME\AgileProxies folder.
20. Make sure the File Manager host name is correct in the following entry:

worker.ajp13w.host=<File Manager fully qualified host name>

---

Note	Make sure you can successfully ping the File Manager using the fully qualified host name and that the AJP port is not blocked by a firewall.
------	--

---

21. Save and close the file.
22. Restart IIS.

---

Note	To restart IIS, stop all of the IIS services through the control panel and then restart them, or restart the computer. This ensures that the .dll is reloaded. Do not use IIS Manager to restart IIS.
------	---

---

## Testing the Configuration

After you set up the Jakarta IIS Connector ISAPI filter, you should test whether the filter loads successfully.

**To make sure the isapi\_redirect filter added to ISAPI Filters tab is loaded properly on the Web server:**

1. Type the File Manager Configuration URL into a browser (using the reverse-proxy web server alias or hostname or listen port) and make sure the Configuration page loads successfully.
2. Select the Agile PLM Web Site node, right-click, and choose Properties from the shortcut menu.  
The Agile PLM Web Site Properties dialog box appears.

3. Select the ISAPI Filters tab.

The status for the Jakarta IIS Connector filter shows an arrow pointing up, indicating that it is loaded on the IIS Web server and ready to proxy all requests to the File Manager.

---

Note	If the arrow is not pointing up, the filter is not loaded properly. In that case, restart the computer.
------	---

---

## Configuring Apache Web Server as a Proxy Server for Agile PLM and Agile File Manager

On UNIX operating systems, you can use Apache Web Server as the Web proxy server for Agile PLM. If you choose the Apache Web Server when you install Agile PLM, you must specify the Apache Home Directory.

---

**Note** If you set up a Web proxy server for Agile File Manager that is different from the server or port you specified when you installed Agile PLM, you must make sure that File Manager points to the proxy server on the correct port. For more information, see “[Reconfiguring File Manager After Setting Up a Web Proxy Server](#) (on page 39)”.  


---

## Configuring Apache Web Server on Solaris

This section shows how to configure an Apache Web Server 2.0.55 proxy for Agile PLM and Agile File Manager on Oracle Application Server 10g for Solaris.

Apache Http Server 2.0.x for Solaris:

<http://archive.apache.org/dist/httpd/binaries/>

Mod\_Jk Connector for Apache 2.0:

Download the connector from <http://www.apache.org/dist/tomcat/tomcat-connectors/jk/binaries/solaris/> or copy the mod\_jk-1.2.15-sparc-Solaris8-Apache20.so file from the AGILE\_HOME\AgileProxies directory.

### To configure Apache Web Server to be a Web proxy server for Agile PLM and Agile File Manager on Solaris:

1. Download, build, and install Apache Web Server for Solaris. For installation instructions, refer to the Apache documentation.

```
./configure --prefix=/opt/apache2 -enable-mods-shared=all
make
make install
```

2. After installing Apache Web Server, install the proxy plug-in:

- a. Go to the following directory:

```
$Apache/modules/proxy
```

- b. Run the following commands:

```
$Apache/bin/apxs -i -a -c proxy_connect.c
$Apache/bin/apxs -i -a -c proxy_http.c
```

3. Download the Mod\_Jk Tomcat Connector from the URL listed above or copy the mod\_jk-1.2.15-sparc-Solaris8-Apache20.so file from the AGILE\_HOME\AgileProxies directory. Save the connector as \$Apache/modules/mod\_jk.so.
4. Create a Mod\_Jk configuration file (\$Apache/conf/workers.properties) with the following entries:

```
worker.list=default
worker.default.type=ajp13
worker.default.host=<File Manager host name>
worker.default.port=8009
```

5. Add the following lines to the \$Apache/conf/httpd.conf file:

```
#Enable Mod_proxy for Application Server Proxying
```

```
LoadModule proxy_connect_module modules/mod_proxy_connect.so
LoadModule proxy_http_module modules/mod_proxy_http.so
#Enable Mod_Jk for File Manager proxying
LoadModule jk_module modules/mod_jk.so

# Add the proxy forward path. Replace appropriately with actual Virtual
# path and server host/port
ProxyPass /Agile http://server:7777/Agile
ProxyPassReverse /Agile http://server:7777/Agile

#Entries for File mgr proxying
JkWorkersFile conf/workers.properties

#Filemgr is virtual path for Agile File Manager
JkMount /Filemgr default
JkMount /Filemgr/* default
```

6. If mod\_proxy was not compiled into httpd, add the following to the \$Apache/conf/httpd.conf file:

```
LoadModule proxy_module modules/mod_proxy.so
```

Open \$Tomcat/conf/jk2.properties and add the following entry: `channelSocket.port=8009`

The AJP Port specified above must match the AJP port specified in \$Tomcat/conf/server.xml.

```
<Connector port="8009"
  maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
  enableLookups="false" redirectPort="8443" debug="0"
  protocol="AJP/1.3" />
```

7. Restart Apache Tomcat.
8. Restart Apache Web Server.

```
$apache/bin/apachectl stop
$apache/bin/apachectl start
```

## Configuring Apache Web Server on Linux

This section shows how to configure an Apache Web Server 2.0.x proxy for Agile PLM and Agile File Manager on Oracle Application Server 10g for Linux.

Generally, when you install Red Hat Linux it includes Apache Web Server 2.0 and the MOD\_PROXY Connector. If your Linux server does not have Apache Web Server, you can

download it from the following location:

Apache Http Server 2.0.x for Linux:  
<http://archive.apache.org/dist/httpd/binaries/>

The Mod Jk Connector for Apache Http Server, which is necessary for using Apache as a proxy for Agile File Manager (Tomcat), can be installed using Red Hat RPM. You can also download the source from the following location and compile it.

Mod\_Jk Connector for Apache 2.0:  
<http://www.apache.org/dist/tomcat/tomcat-connectors/jk/binaries/linux/> or contact Agile Support.

### **To configure Apache Web Server to be a Web proxy server for Agile PLM and Agile File Manager on Linux:**

1. Open the Apache Web Server \$Apache/conf/httpd.conf file and ensure that the following modules are uncommented:

```
LoadModule proxy_module modules/mod_proxy.so
LoadModule proxy_connect_module modules/mod_proxy_connect.so
LoadModule proxy_http_module modules/mod_proxy_http.so
```

2. At the end of the \$Apache/conf/httpd.conf file, add the following ProxyPass and ProxyPassReverse commands. Replace the hostname, port, and Agile virtual path with appropriate values for your server.

```
ProxyPass /Agile http://server:7777/Agile
ProxyPassReverse /Agile http://server:7777/Agile
```

3. Copy the workers.properties and uriworkermap.properties files from the AGILE\_HOME/AgileProxies directory to the \$Apache/conf directory.
4. Replace the following tokens in the workers.properties and uriworkermap.properties files:

```
@FILE_SERVER_VIRTUAL_PATH@ = File Manager Virtual Path
@FILE-SERVER-HOST@ = Tomcat hostname or IP address
@AJP-PORT@ = Tomcat AJP Protocol port (This port can be found in
Tomcat's server.xml file)
```

5. Add the following lines to the \$Apache/conf/httpd.conf file:

```
LoadModule jk_module modules/mod_jk-1.2.14-apache-2.0.54.so
JkWorkersFile conf/workers.properties
JkMount conf/uriworkermap.properties
```

6. Open \$Tomcat/conf/jk2.properties and add the following entry:

```
channelSocket.port=8009
```

The AJP Port specified above must match the AJP port specified in \$Tomcat/conf/server.xml.

```
<Connector port="8009"
maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
enableLookups="false" redirectPort="8443" debug="0"
protocol="AJP/1.3" />
```

7. Restart Apache Tomcat.
8. Restart Apache Web Server.  
\$apache/bin/apachectl stop  
\$apache/bin/apachectl start

## Configuring Apache Web Server on AIX

This section describes how to configure Apache HTTP Server 2.0.x on AIX as a reverse proxy for Agile PLM with Oracle Application Server 10g and Agile File Manager with Apache Tomcat.

Download the Apache HTTP Server 2.0.x distribution:

Download the Apache Http Server 2.0.x distribution:

<http://archive.apache.org/dist/httpd/>

Alternatively, you may be able to find a pre-compiled version of the HTTP server for AIX here:

<http://archive.apache.org/dist/httpd/binaries/aix/>

Download the Apache Tomcat connector module (mod\_jk) for Apache 2.0.x:

<http://www.apache.org/dist/tomcat/tomcat-connectors/jk/>

Alternatively, you may be able to find a pre-compiled version of the connector for AIX here:

<http://www.apache.org/dist/tomcat/tomcat-connectors/jk/binaries/aix/>

### To configure an Apache HTTP Server on AIX as a reverse proxy server for Agile PLM and Agile File Manager:

1. Download and install (and if necessary, build) Apache HTTP Server for AIX. For instructions, refer to the documentation included in the Apache distribution.
2. After installing Apache HTTP Server, install the proxy plug-in:
  - a. Change to the following directory:  
\$APACHE\_HOME/modules/proxy
  - b. Run the following commands:  
\$APACHE\_HOME/bin/apxs -i -a -c proxy\_connect.c  
\$APACHE\_HOME/bin/apxs -i -a -c proxy\_http.c
3. Download (and if necessary, build) the Apache Tomcat connector (mod\_jk) from the URL previously listed. Save the connector as \$APACHE\_HOME/modules/**mod\_jk.so**.
4. Create a configuration file (\$APACHE\_HOME/conf/workers.properties) for the Apache Tomcat connector with the following entries:  
worker.list=default  
worker.default.type=ajp13  
worker.default.host=<File Manager host name>  
worker.default.port=8009
5. Add the following lines to the \$APACHE\_HOME/conf/httpd.conf file:  
#Enable Mod\_proxy for Application Server Proxying  
LoadModule proxy\_connect\_module modules/mod\_proxy\_connect.so

```

LoadModule proxy_http_module modules/mod_proxy_http.so
#Enable Mod_Jk for File Manager proxying
LoadModule jk_module modules/mod_jk.so
#Add the proxy forward path. Replace appropriately with actual Virtual
#path and server host/port
ProxyPass /Agile http://<application> server hostname>:7777/Agile
ProxyPassReverse /Agile http://<application> server
hostname>:7777/Agile
#Entries for File Mgr proxying
JkWorkersFile conf/workers.properties
#Filemge is the virtual path for Agile File Manager
JkMount /Filemgr default
JkMount /Filemgr/* default

```

6. If mod\_proxy was not compiled into httpd, add the following line to the \$APACHE\_HOME/conf/httpd.conf file:

```
LoadModule proxy_module modules/mod_proxy.so
```

7. Edit the file \$TOMCAT\_HOME/conf/jk2.properties and add the following entry for the AJP port:

```
channelSocket.port=8009
```

The AJP Port specified above must match the AJP port specified in \$TOMCAT\_HOME/conf/server.xml.

```

<Connector port="8009"
    maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
    enableLookups="false" redirectPort="8443" debug="0"
    protocol="AJP/1.3" />

```

8. Restart Apache Tomcat.
9. Restart Apache HTTP Server.

```

$APACHE_HOME/bin/apachectl stop
$APACHE_HOME/bin/apachectl start

```

## Enabling Debugging Information for the Jakarta Tomcat Connector

To troubleshoot problems with the Apache Web Server proxy for Agile File Manager, you can save debugging information for the Jakarta Tomcat Connector.

### To save debugging information for the Jakarta Tomcat Connector:

1. Open the \$Apache/conf/httpd.conf, and add the following lines (after the JkMount setting):

```

JkLogFile "logs/mod_jk.log"
JkLogLevel debug

```

2. Save the file.
3. Restart Apache Web Server.
4. Open the log file and check for errors.

## Logging In to the Agile Web Client

Open your browser and go to the following URL to test the Agile Web client setup:

[http://webserver\\_hostname:port/virtual\\_path/PLMServlet](http://webserver_hostname:port/virtual_path/PLMServlet)

---

Note	The URL is case-sensitive. The default virtual path is Agile.
------	---

---

The login window for the Agile Web client appears in the browser.

## Troubleshooting the Agile Web Client

This section provides the basics for troubleshooting the Agile Web client and Web server issues.

### Confirming Accessibility

Confirm that the following connections are valid:

- Ping the Agile Application Server computer to make sure it is accessible from the Agile Web components computer and that the specified port is available.
- Make sure the IIS Web server is up and running on the specified ports, and that the specified DNS hostname is valid and registered for external accessibility by the Agile Web client browsers.

### URL Error Messages

If you specify this URL in the browser and receive the message “Page not found,” check the following:

- Make sure that the IIS Web server is accessible.
- Open the iisproxy.ini file and make sure the client virtual path name is the same as the login URL for the Agile Web client.
- Make sure the Agile Viewer has started on the host computer.

If the following error message appears:

“Servlet tunneling to AgileViewerHost:5099 (IP=x.x.x.x) Connection state: ERROR”

- Check to see if the Agile Viewer hostname specified during the installation is correct and the port number is available. The information on the Agile Viewer hostname and port number is specified in the web.xml file.
- Make sure the Agile Viewer-specific ports are open from DMZ firewall to the internal firewall.



## Log Files (Disk Space)

There are two log files for the Agile Web client:

- OASproxy log
- Web client log

If all log files are on, disk space can fill quickly. You may need to clean up the log files or turn logging off.

### For the OASproxy.log file:

1. Locate the key, HKEY\_LOCAL\_MACHINE\SOFTWARE\ORACLE\IIS Proxy Adapter, in the Windows Registry Editor.
2. Add the log-level entry value in the right pane as debug.

### For the Agile Web client log file:

1. Open the \AGILE\_HOME\agileDomain\config\log.xml file.
2. Change the <priority value="debug" /> line to <priority value="error" />.
3. Delete all files with a LOG extension appearing in the \AGILE\_HOME\agileDomain\config folder.

## Connection Refused or Server is Busy Error Message

TCP connections can be buffered in a wait queue, which has a default value of 50. To increase this value, open \AGILE\_HOME\agileDomain\config\config.xml and increase the wait queue attribute value by 25 percent until the messages no longer appear.

## Changing Logging Priority

You can change the behavior of the information added to the log file for the Agile Web client.

1. Using a text editor, open the log.xml file (by default, it is located in \AGILE\_HOME\agileDomain\config folder).
2. Scroll to the bottom of the file and add the following lines before the </configuration> line:

```
<category name="com.agile">
  <priority value="error" />
  <appender-ref ref="A1" />
</category>
```

3. Save and close the file.
4. Open a browser and type the following in the Address field:

[http://hostname:port/virtual\\_path/PLMServlet?changeLog=true](http://hostname:port/virtual_path/PLMServlet?changeLog=true)



# Configuring the Microsoft Excel-based Client for Agile PG&C

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## Overview of the Microsoft Excel-based Client for Agile PG&C

**Important** Configuration steps described in this chapter apply only to customers who have purchased Agile Product Governance & Compliance.

Agile Product Governance & Compliance (PG&C), one of the Agile PLM product solutions, is designed to help manufacturers audit the presence and amount of regulated substances used in their products, and to demonstrate that they responsibly dispose of, recycle, or reuse parts containing those substances. Agile PG&C includes built-in support for the Microsoft Excel-based client for OEM manufacturing regulations, including the Japan Green Procurement Survey Standardization Initiative (JGPSSI), and substances and weights rollups.

**Important** Although Agile provides two Microsoft Excel templates for Agile PG&C, the solution is extensible. You can develop other Microsoft Excel templates to handle other Declaration classes your company has defined. For information about how to develop Microsoft Excel templates for use with Agile PG&C, contact your Agile Solutions Delivery representative.

**Important** After installing Agile PLM, if any of the changes detailed in this chapter are required for your Excel integration, the correct sequence is: (a) stop the application server(s); (b) undeploy; (c) make the changes in <standard Agile PLM Install folder> > application.ear; (d) re-deploy; and (e) re-start the servers.

## JGPSSI Support

JGPSSI has created a standardized digital form that companies can use to inquire about the chemical substances contained in parts and materials they procure in Asia. For more information about JGPSSI, see the Japan Electronics and Information Technology Industries Association Web site:

<http://home.jeita.or.jp/eps/greenTOP-eg.html> (<http://home.jeita.or.jp/eps/greenTOP-eg.html>)

JGPSSI uses Microsoft Excel tools for collecting information about substances contained in assemblies for Japanese Green Procurement. Agile provides a flexible and reusable integration between Agile PG&C and Microsoft Excel that allows customers to use the JGPSSI spreadsheet without modification, and then upload the information to Agile PG&C after validation.

---

Note	Agile PLM supports the JGPSSI survey tool (a Microsoft Excel template) version 2.02.
------	--

---

Agile PLM supports a Japanese-language template of the JGPSSI spreadsheet. The Japanese-language templates are only available to customers who have purchased the Japanese Server License. Also, the administrator must set users' Language and Encode user preferences to the appropriate setting to work in that language in the Agile clients' user interfaces. Please contact Agile Solutions Delivery for more information.

## Substances and Weights Rollups

You can use Microsoft Excel to perform analysis of the Bill of Substances (BOS) information for an assembly. Using the Actions menu command Rollup in Excel, the integrated Excel spreadsheet can roll up the substances and weights for the top-level assembly.

---

Note	Agile PLM supports a Japanese-language template of the Substances and Weights spreadsheet.
------	--

---

PLM also supports localized versions in Chinese, French, and German of the Substances and Weights Rollup feature used in Microsoft Excel-base Client. However, the localized template does not work for these languages out-of-the-box, the template must be adjusted by Oracle Consulting-Agile Practice.

The Japanese-language templates are only available to customers who have purchased the Japanese Server License. Localized versions also need appropriate License Key. Also, the administrator must set users' Language and Encode user preferences to the appropriate setting to work in that language in the Agile clients' user interfaces. Please contact Oracle Consulting-Agile Practice for more information.

## Client Software Requirements

The Microsoft Excel-based client for Agile PG&C requires the following client-side software:

### Operating System

- Windows 2000 Pro SPX
- Windows XP Pro SP2
- Windows 2003 Pro SP1

## Client Applications

- Microsoft Excel 2000, Microsoft Excel XP, or Microsoft Excel 2003 Pro SP1
- Microsoft Internet Explorer 6.0

For complete Agile PLM software requirements, see the *Agile PLM Capacity Planning and Deployment Guide*.

## Microsoft Excel-based Client FAQ

This section answers some common questions about the Microsoft Excel-based client for Agile PG&C.

How does the Microsoft Excel-based client work? What is the underlying technology used to integrate with Agile PG&C?

The Microsoft Excel-based client uses the following technology:

- Agile PLM Process Extensions – Agile Web Client launches the Microsoft Excel-based client through process extensions (PX), which are programs that extend the functionality of the client interface.
- Agile PLM ActiveX Control – an Internet Explorer plugin that monitors use of the Microsoft Excel-based client and downloads and uploads data from the Agile PLM server as requested by the client.
- HTTP, HTTPS, or SMTP – standard protocols used to move data between the server and the client
- Microsoft Excel – spreadsheet client with its own client-side business logic.

Other than Microsoft Excel, is any other client software required for the Microsoft Excel-based client?

The Agile PLM ActiveX Control, an Internet Explorer plugin, is required. It's downloaded and installed automatically the first time a user launches the Microsoft Excel-based client from Agile Web Client. Of course, Internet Explorer 6.0 is also required, as well as a Windows operating system.

What Microsoft Excel templates does Agile PG&C provide by default?

There are two Excel applications provided out-of-the-box with Agile P&C:

- JGPSSI Declaration application – supports Japanese Green Procurement
- Rollup In Excel application – calculates substances and weights rollups for top-level assemblies

Can I create new Microsoft Excel templates for use with Agile PG&C?

Yes, the solution is extensible. For information on how to develop Microsoft Excel templates for Agile PG&C, contact your Agile Solutions Delivery representative.

Can I create Microsoft Excel templates for use with other Agile PLM solutions, such as Product Collaboration?

No. Currently, only Declaration classes and their subclasses are supported. Other classes may be supported in future Agile PLM releases.

Can I use the Firefox browser to launch the Microsoft Excel-based client?

No. Only Microsoft Internet Explorer 6.0 is supported.

Must I be logged into Agile Web Client to use the Microsoft Excel-based client for Agile PG&C?

No. You can use the Microsoft Excel-based client synchronously (that is, by opening a spreadsheet from Agile Web Client) or asynchronously (that is, by opening a spreadsheet attached to an email message).

How do I launch the Microsoft Excel-based client from Agile Web Client?

Process extensions are used to launch the Microsoft Excel-based client. The process extension for launching JGPSSI-in-Excel is initiated from the Actions menu of JGPSSI declarations. The process extension for launching Substances and Weights rolldup in Excel is initiated from the Actions menu of items. For information about developing process extensions, see the *Agile SDK Developer Guide*.

Can I sign the Agile PLM ActiveX Control with my company's certificate?

Yes. See "[Digitally Signing the Agile PLM ActiveX Control](#) (on page 66)".

Does the Microsoft Excel-based client require any special authentication?

The Microsoft Excel-based Client uses the same credentials that you use to log into Agile Web Client, and it prompts you to log into a separate Agile PLM session when you choose Agile > Submit Response or Agile > Open Request.

Where does the client-side business logic for the Microsoft Excel-based client reside?

Client-side business logic resides entirely in the Microsoft Excel template.

How does the Microsoft Excel-based client handle notifications for Declarations?

Agile PLM provides four system-generated notifications related to the Microsoft Excel-based client:

- Declaration Excel Submit Success Supplier Notification – notification sent to the supplier to confirm successful submission of a Declaration.
- Declaration Excel Submit Import Failure – notification sent to the compliance manager or originator to inform him that the submitted Declaration failed to be processed on the server due to import problems.
- Declaration Excel Submit Failure – notification sent to the compliance manager or originator to inform him that the submitted Declaration failed to be processed on the server due to an exception.
- Declaration Excel Submit Failure Supplier Notification – notification sent to the supplier to inform him that the Declaration failed to be submitted due to import errors.

Each notification includes text for the subject and body of a message. The Agile PLM administrator can modify these notification messages.

To customize these notifications, start the Agile Java Client and log in as an administrator user. Click the Admin tab, and choose System Settings > Notifications > Declaration Notifications. Microsoft Excel-based client notifications are listed under "Declaration Miscellaneous Notifications."

For more information about Agile PLM notifications, see the *Agile PLM Administrator Guide*.

What languages does the Microsoft Excel-based client support?

The JGPSSI and Rollup in Excel standard templates support English only. Other templates can be developed to support other languages.

Microsoft Excel-based client messages and captions support all languages supported by Agile PLM 9.2.2.4. Additionally, the menus of Microsoft Excel templates can be customized for different languages.

Does the Microsoft Excel-based client use VBA macros?

The Microsoft Excel templates provided for Agile PG&C do not use VBA macros. Although you are not prevented from developing a Microsoft Excel template that uses VBA macros, antivirus software may prevent the macros from running, and you should set the security level in Microsoft Excel to at least Medium (choose Tools > Macro > Security).

## Configuration Sequence

To enable support for the Microsoft Excel-based client for Agile PG&C, you must perform the following manual configuration steps after Agile PLM has been installed:

1. Set up privileges for Agile PG&C objects (such as Substances and Declarations).
2. Enable specific attributes in PG&C-related classes to ensure the Microsoft Excel-based client functions correctly.
3. Restrict Declaration names to 50 characters for every class that you are enabling the Microsoft Excel-based client.
4. Obtain a production license for the Agile PLM ActiveX Control from your Agile Account Executive and deploy the related files on the Agile Application Server.
5. Optionally, digitally sign the Agile PLM ActiveX Control.
6. Use Agile Java Client to set the Allow Download of Productivity Components preference to Yes. This allows Agile Web Client users to download the Agile PLM ActiveX Control from the server.
7. Install the Agile PLM ActiveX Control.
8. Test that the Microsoft Excel-based client for Agile PG&C works properly.

## Setting Privileges for Agile PG&C Objects

This section describes how to set privileges for Agile PG&C objects. If you don't ensure that privileges are properly set, you may not be able to move data from the JGPSSI spreadsheet into Agile PLM and vice versa.

**To set privileges for Agile PG&C objects:**

1. Log into Agile Java Client as a user with Administrator privileges.
2. Click the Admin tab.
3. Choose User Settings > Privileges.
4. Open the following privilege masks, and for each one click the drop-down arrow next to the Applied To field and add the following attributes:

Privilege Mask	Attributes to Add to the Applied To Field

Privilege Mask	Attributes to Add to the Applied To Field
Read Substances	Substances.Page Two.Text01
Modify Substances	
Modify Supplier Created Declarations	Declarations.Page Two.Text02, Text03, Text08 – Text10, Text14, Text19 – Text21 Declarations.Items.Date01 Declarations.Items.List01 - List03 Declarations.Items.Text01 - Text09 Declarations.Manufacturer Parts.Date01 Declarations.Manufacturer Parts.List01 - List03 Declarations.Manufacturer Parts.Text01 - Text09 Declarations.Part Groups.Date01 Declarations.Part Groups.List01 - List03 Declarations.Part Groups.Text01 - Text09
Read Declarations	
Read My Open and Submitted Declarations	
Read Supplier Created Declarations	
Modify Declarations	
Modify My Open Declarations	Declarations.Page Two.Text14, Text19 – Text21 Declarations.Items.Date01 Declarations.Items.List01 - List03 Declarations.Items.Text01 - Text09 Declarations.Manufacturer Parts.Date01 Declarations.Manufacturer Parts.List01 - List03 Declarations.Manufacturer Parts.Text01 - Text09 Declarations.Part Groups.Date01 Declarations.Part Groups.List01 - List03 Declarations.Part Groups.Text01 - Text09

5. After modifying the Applied To field for each of the privilege masks listed above, Click OK.
6. To save the privilege mask, click Save.
7. Click Close.
8. Click Close.



## Enabling Attributes that are Required for Excel Rollups

The following attributes must be enabled (Visible property is set to Yes for each attribute) at the class level for the Microsoft Excel-based client to function correctly.

### Classes: Parts, Manufacturer Parts, and Documents

#### Compliance Tab > Composition Table

- Specification Name
- Declaration Name
- Declared Weight
- Supplier

#### Compliance Tab > Substances Table

- Child Level
- Substance Name
- Substance Type
- Mass
- Declared PPM
- CAS Number
- Conversion Factor

### Classes: Parts and Documents

#### BOM Tab

- Item Number
- Item Description
- Item Rev (Item Revision)
- Qty (Quantity)

#### Manufacturers Tab

- Mfr. Part Number
- Mfr. Part Description
- Mfr. Name

## Restricting the Length of Declaration Names

Agile's Microsoft Excel-based client requires Declaration names to not exceed 50 characters. If a Declaration has a name longer than 50 characters, you might not be able to open it in Microsoft Excel.

To avoid potential problems opening Declarations with long names, you should restrict Declaration names to 50 characters for every class that you are enabling the Microsoft Excel-based client. You can do this by making autonumbers required (assuming that each number in the autonumber sequence does not exceed 50 characters) or by adjusting the maximum length of the Cover Page > Reference Number attribute.

### **To make autonumbers required for a Declaration subclass:**

1. Log into the Agile Java Client as an administrator.
2. Click the Admin tab.
3. Under Data Settings, double-click Classes.
4. Open a Declaration subclass that has enabled the Microsoft Excel-based client (for example, JGPSSI Declaration).
5. Select the General Information tab.
6. In the Autonumber Required list, select Yes.
7. In the Autogenerate list, select Yes.
8. Click Save.

### **To adjust the maximum length of Declaration names:**

1. Log into the Agile Java Client as an administrator.
2. Click the Admin tab.
3. Under Data Settings, double-click Classes.
4. Open a Declaration class that has subclasses that have enabled the Microsoft Excel-based client (for example, JGPSSI Declarations).
5. Click the User Interface Tabs tab.
6. double-click Cover Page.
7. Click the Attributes: Cover Page tab.
8. double-click the Reference Number attribute.
9. Set the MaxLength property to 50 or less.
10. Click Save.

## Deploying License Files for the Agile PLM ActiveX Control

To enable support for the Microsoft Excel-based client for Agile PG&C, you must obtain a valid

license for the Agile PLM ActiveX Control, an Internet Explorer plugin. This license is specific to the server on which the Agile Application Server is installed. To obtain the license file (license.xml) and a properties file (properties.js), contact your Agile Account Executive.

After you obtain the license file and properties file, you need to deploy the files on the Agile Application Server.

---

Note	If you have an application server cluster, you must deploy the Agile PLM ActiveX Control license files on the Respository Host server for Oracle Application Server or the Administration Server for WebLogic Server. The application server will then propagate the license files to other servers in the cluster.
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#### **To deploy license files for the Agile PLM ActiveX Control:**

1. Stop the Web proxy server.
2. Stop the Agile Application Server.
3. Windows: On the application server computer, open a command prompt window.  
UNIX: On the application server computer, open a terminal window and log on as the user who installed the Agile Application Server.
4. Expand the Agile application.ear file:  
Windows: \AGILE\_HOME\install\bin\ExtractArchive.cmd  
UNIX: /AGILE\_HOME/install/bin/ExtractArchive.sh
5. Copy the license.xml and properties.js files that you received from Agile to the following location:  
\AGILE\_HOME\agileDomain\applications\ExpandedEar\ExpandedWar\ambassador
6. Repack the Agile application.ear file:  
Windows: \AGILE\_HOME\install\bin\RepackArchive.cmd  
UNIX: /AGILE\_HOME/install/bin/RepackArchive.sh
7. Undeploy the Agile application, and then redeploy it.  
Windows:  
\AGILE\_HOME\agileDomain\bin\UnDeployAgilePLM.cmd  
\AGILE\_HOME\agileDomain\bin\DeployAgilePLM.cmd  
UNIX:  
/AGILE\_HOME/agileDomain/bin/UnDeployAgilePLM.sh  
/AGILE\_HOME/agileDomain/bin/DeployAgilePLM.sh
8. Start the Agile Application Server.
9. Start the Web proxy server.

## **Using the Developer Version of the Microsoft Excel Integration License File**

If you are developing or testing Microsoft Excel templates for Agile PLM Declaration classes, you

can use the developer version of the Microsoft Excel integration license file that is installed with the Agile PLM server. The developer license for the Agile PLM ActiveX Control provides the same functionality as the production license. However, when you install it, a warning message appears: "An UNTRUSTED web site is trying to use Agile PLM ActiveX Control to control your desktop." Click Yes in the warning dialog box to continue installing the control.

## Digitally Signing the Agile PLM ActiveX Control

The first time you choose one of the commands that launch the Microsoft Excel-based client (such as Actions > Open In Excel) in Agile Web Client, the Agile PLM ActiveX Control is automatically downloaded and installed on your computer. For security reasons, Internet Explorer requires that software it downloads must have a digital signature. A digital signature lets you verify the contents of a file and ensures that it comes from a trusted source.

When you install Agile PLM, the Agile PLM ActiveX Control is already digitally signed from Agile Software. You can choose to use your company's own digital signature for the control instead. If you use your company's digital signature, each time a user of your Agile PLM system downloads the Agile PLM ActiveX Control it will be recognized as coming from your company and not from Agile Software.

You provide a digital signature by purchasing a certificate from a certificate authority. A certificate authority is an entity that issues digital certificates for use by other parties. Examples of certificate authorities are Verisign (<http://www.verisign.com/> (<http://www.verisign.com/>)) and CAcert (<http://www.cacert.org/> (<http://www.cacert.org/>)).

For more information about digital signatures, go to the MSDN site (<http://msdn.microsoft.com/> (<http://msdn.microsoft.com/>)) and search for "Digitally Signing ActiveX Components".

### To digitally sign the Agile PLM ActiveX Control:

1. Stop the Web proxy server.
2. Stop the Agile Application Server.
3. Windows: On the application server computer, open a command prompt window.  
UNIX: On the application server computer, open a terminal window and log on as the user who installed the Agile Application Server.
4. Expand the Agile application.ear file  
Windows: `\AGILE_HOME\install\bin\ExtractArchive.cmd`  
UNIX: `/AGILE_HOME/install/bin/ExtractArchive.sh`
5. Digitally Sign the agileambassador.cab file found in the following location:  
`\AGILE_HOME\agileDomain\applications\ExpandedEar\ExpandedWar\ambassador`
6. Repack the Agile application.ear file  
Windows: `\AGILE_HOME\install\bin\RepackArchive.cmd`  
UNIX: `/AGILE_HOME/install/bin/RepackArchive.sh`
7. Undeploy the Agile application, and then redeploy it.  
Windows:

```
\\AGILE_HOME\\agileDomain\\bin\\UnDeployAgilePLM.cmd
```

```
\\AGILE_HOME\\agileDomain\\bin\\DeployAgilePLM.cmd
```

UNIX:

```
/AGILE_HOME/agileDomain/bin/UnDeployAgilePLM.sh
```

```
/AGILE_HOME/agileDomain/bin/DeployAgilePLM.sh
```

8. Start the Agile Application Server.
9. Start the Web proxy server.

## Enabling Downloading of Productivity Components

The Agile PLM ActiveX Control is a plugin for Microsoft Internet Explorer that users can download to their client machines. To enable downloading of the Agile PLM ActiveX Control from the server, the Agile PLM administrator must log into the Agile Java Client and make sure the Agile PLM preference named Allow Download of Productivity Components is set to Yes. Otherwise, users won't be able to download the ActiveX control and use the Microsoft Excel-based client.

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Note	The Agile PLM ActiveX Control is supported only on the Microsoft Internet Explorer browser. You cannot use it with other browsers, such as Firefox.
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### To enable downloading of the Agile PLM ActiveX Control:

1. Log into Agile Java Client as a user with Administrator privileges.
2. Click the Admin tab.
3. Choose Server Settings > Preferences.
4. For the Allow Download of Productivity Components preference, select Yes.
5. Click Save.

For more information about setting Agile PLM preferences, see the *Agile PLM Administrator Guide*.

## Installing the Agile PLM ActiveX Control

If you enable downloading of the Agile PLM ActiveX Control (see the previous section), the plugin is installed automatically on the client computer when you choose a command (such as Actions > Open In Excel) that launches the Microsoft Excel-based client. Separate installation of the plugin is unnecessary.

Some companies have strict security procedures that prohibit users from installing ActiveX controls automatically onto their desktop computers. If that is the case with your company, your IT department can install the Agile PLM ActiveX Control by downloading an installer for the plugin from the Agile Support site (<http://support.agilesoft.com> (<http://support.agile.com>)).

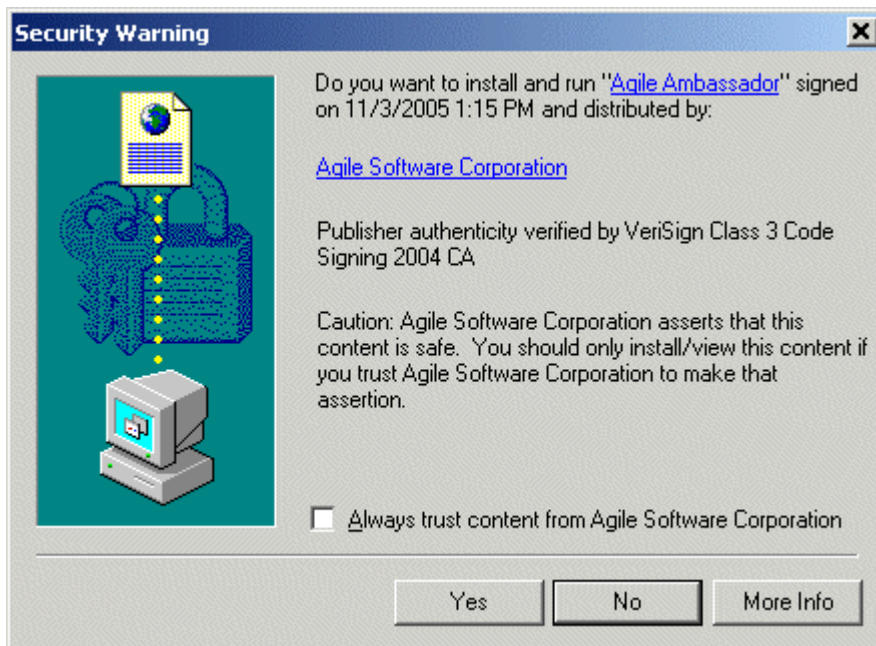
## Testing the Microsoft Excel-based Client for


## Agile PG&C

This section describes how to test whether the Microsoft Excel-based client works properly.

### To test JGPSSI Declarations:

1. In Agile Web Client, choose Create > Declarations > JGPSSI Declarations.
2. Specify a supplier. Also, make sure the Continue Creation in Wizard box is checked. Click Continue.
3. In the Compliance Manager field, select a user who is a compliance manager.
4. In the Workflow field, select Default Declarations. Click Next.
5. On the Add Specifications page, click Next.
6. On the Add Items page, click Add to add an item. Type an existing item number and Click OK.
7. Click Finish.
8. Choose Actions > Open in Excel. After a moment, a Security Warning dialog box appears.



9. Make sure the Always trust content from Agile Software Corporation box is checked. Click Yes to install and run the Agile PLM ActiveX Control (also called Agile Ambassador).
10. After a moment, Microsoft Excel is launched and a file with the name *declaration\_number.xls* is opened. You are prompted to save the file to a folder on your desktop called Agile Spreadsheet Files. Click Save.
11. Close Microsoft Excel and return to Agile Web Client.
12. For the new JGPSSI Declaration you created, click Next Status to open it to the supplier.
13. Select users to notify, and Click OK.
14. Click the Exit  button to log out.

15. Click Login. Log in as a contact user for the supplier associated with the JGPSSI Declaration.
16. Click the link to the JGPSSI Declaration to open it.
17. In the Navigation pane, click Open In Excel.
18. After a moment, Microsoft Excel is again launched and the same file as earlier is opened. You are prompted to save the file to a folder on your desktop called Agile Spreadsheet Files. You already saved it earlier, so click Cancel.
19. Fill in a one or more fields on the sheet. For example, change the value of the Parts Mass field.
20. Save the Microsoft Excel file.
21. Choose Agile > Submit Response. You need to log in at this point. The Submit Response window appears.
22. Type your approval password, and click Submit.
23. After your response is uploaded, a message box appears: "The declaration has been submitted for processing. Updates may not be immediately visible in the Agile system." Click OK.

**To test Substances and Weights Rollups:**

1. In Agile Web Client, open a part that is a top-level assembly with multiple substances.
2. Choose Actions > Rollup in Excel.
3. Select the specification that is used for the composition, and Click OK. The Excel file with the same filename as the part number appears.
4. In the Excel file, choose Agile > Run Scenario. The rolled-up amounts for materials and substances used in the assembly are displayed.

## Troubleshooting

This section provides solutions to problems you may encounter in configuring the Microsoft Excel-based client for Agile PG&C.

### Import and Error Logs

Import and error logs for the Microsoft Excel-based client can be found in the server's Temp folder.

On Windows 2000/2003 servers, the Temp folder is usually found at

C:\Documents and Settings\<current\_logged\_in\_user>\Local Settings\Temp\AgileEITemp

or

C:\Winnt\Temp\AgileEITemp

If you are unsure where to find the Temp folder, open a Command Prompt window and type the following command:

```
cd %temp%\AgileEITemp
```

On UNIX servers, the Temp directory is usually found at

/var/tmp/AgileEITemp

The most recent folder under AgileEITemp contains data and import or error logs of the last submission done in Excel

Runtime error

When you choose any command that launches the Microsoft Excel-based client (such as Actions > Open In Excel) in Agile Web Client, a Runtime Error window appears.

**Solution:**

The license files for the Agile PLM ActiveX Control, which are located on the Agile Application Server, are invalid. Please contact Agile Support to request new license files. Once you receive the files, you must deploy them on the application server. See "[Deploying License Files for the Agile PLM ActiveX Control](#)" (on page 64)".

This feature has not been enabled by the application administrator

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the popup window reads, "This feature has not been enabled by the application administrator." Consequently, the Agile PLM ActiveX Control could not be downloaded.

**Solution:**

In the Agile Java Client, set the Agile PLM preference Allow Downloading of Productivity Components to Yes. See "[Enabling Downloading of Productivity Components](#)" (on page 67)".

The page cannot be displayed

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the popup window reads, "The page cannot be displayed."

**Solution:**

Make sure the Web proxy server is running.

Instead of opening a Microsoft Excel file, Agile Web Client login page appears in another window

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the Microsoft Excel file doesn't appear and instead a new browser window opens with Agile Web Client login page.

**Solution:**

- Make sure Agile Web Client login page you're using has the fully qualified domain name for the server in the URL. For example, if the fully qualified domain name of the server is "plm.mycompany.com", Agile Web Client login page URL should look like this:  
<http://plm.mycompany.com/Agile/PLMServlet>
- Make sure the Agile PLM ActiveX Control license file (license.xml) uses a fully qualified domain name for the Agile Application Server.

The Open In Excel pop-up window appears and then closes, but Microsoft Excel doesn't launch

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the Open In Excel pop-up window appears for a few seconds, and then it closes without launching



Microsoft Excel.

**Solution:**

The Declaration you're trying to open has a very long name. Choose Actions > Save As to save the Declaration with a name that is 50 characters or less.

To avoid this problem, restrict Declaration names to 50 characters. See "[Restricting the Length of Declaration Names](#) (on page 64)".

The Actions menu does not include commands to launch the Microsoft Excel-based client

When you open an Item in Agile Web Client, the Rollup in Excel command isn't available on the Actions menu. When you open a JGPSSI Declaration in Agile Web Client, the Open In Excel, Import JGPSSI, and Export JGPSSI commands aren't available on the Actions menu.

**Solution:**

The Agile PG&C process extensions have not been assigned to Agile PLM classes. The Agile PG&C process extensions are assigned automatically to classes when Agile PLM is installed, but perhaps the Administrator modified the classes and inadvertently unassigned the Agile PG&C process extensions.

Here is how the Agile PG&C process extensions should be assigned:

- The Rollup In Excel process extension must be manually assigned to the Items classes, that is, Parts and Documents.
- The Open In Excel, Import JGPSSI, and Export JGPSSI process extensions should be automatically assigned to the JGPSSI Declarations class. Please verify that this was accomplished; if they did not load, it needs to be done manually.

For information on how to assign process extensions to classes, see the *Agile PLM Administrator Guide*.

The cell or chart you are trying to change is protected and therefore read-only

When you open a JGPSSI Declaration in Microsoft Excel and try to edit one of the cells, you see the following error message: "The cell or chart you are trying to change is protected and therefore read-only. To modify a protected cell or chart, first remove protection using the Unprotect Sheet command (Tools menu, Protection submenu). You may be prompted for a password."

**Solution:**

The colored cells of the JGPSSI template (such as headings) are protected and cannot be edited. You should edit only unshaded (white) cells.

Microsoft VBScript runtime error 1B6: Object doesn't support this property or method

When you choose any command that launches the Microsoft Excel-based client (such as Actions > Open in Excel) in Agile Web Client, an error message appears: "Microsoft VBScript runtime error 1B6: Object doesn't support this property or method."

**Solution:**

Internet Explorer had problems downloading the digital certificate for the Agile PLM ActiveX Control. Click OK in the error message box to continue.

The problem may be due to a comma in the Company field of the digital certificate. If there isn't a comma in the Company field, you may need to update your Internet Explorer browser with the latest patch from Microsoft.

You must restart your computer before the new settings will take effect

When you choose any command that launches the Microsoft Excel-based client (such as Actions > Open in Excel) in Agile Web Client, a message box appears: "You must restart your computer before the new settings will take effect. Do you want to restart your computer now?"

**Solution:**

You have a previous version of the Agile PLM ActiveX Control installed, and Microsoft Excel is currently open, so the control cannot be updated. To install the new control, close Excel, and then click No in the message box (to not restart the computer). Choose Actions > Open in Excel again.

# Configuring Agile Product Portfolio Management

**This chapter includes the following:**

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## Overview

Agile Product Portfolio Management (PPM) gives you powerful capabilities to define, analyze, and manage all aspects of a project or program. In Agile PLM 9.2.2.4, some of the business rules have been changed. These changes impact the data you have already created because the computations were based on previous rules. During an upgrade from a previous version of PPM, data migration is necessary in order for the existing data to comply with the new business rules.

To facility the data migration, a post upgrade utility has been developed.

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Note	The PPM post upgrade utility is NOT supported on WebSphere Application Server.
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## PPM Post Upgrade Utility

The PPM Post Upgrade utility was developed to address the following changes in Agile PLM:

- Identifies all resource pool assignments where actual hours are greater than zero and sets the actual hours value to zero.
- Identifies the leaf tasks that have an incorrect percent complete value, corrects the value, and then correctly rolls up the value on the parent task.
- Identifies the tasks where estimated dates should be corrected based on the new business rules:
  - a. If one of the estimated dates for a leaf task is null, it will be automatically populated, based on the other estimated date, only if the other date is not null.
  - b. The estimated date is rolled up to the parent task considering the schedule date of the child task, if the child's estimated date is null.
- Identifies all tasks that have an incorrect value for Actual Time and corrects them.

## Running the PPM Post Upgrade Utility

The utility is installed after you have upgraded your system to Agile PLM 9.2.2.4. The files are located at AGILE\_HOME/agileDomain/tools/922PPMPostUpgradeUtility.zip

---

**Important** This utility should be run on the machine where Agile PLM 9.2.2.4 is installed.

---

### To run the PPM Post Upgrade Utility:

1. Unzip the utility files to a temporary directory.
2. Change to the directory where you have unzipped the files and locate the upgrade.properties file.
3. Edit the following entries in the upgrade.properties file to match your environment:

Server Settings	
server.url	URL of the Agile PLM 9.2.2.4 application The format is <protocol>://<machine_name>/<application_name>. On OAS, the protocol should be ormi. On WebLogic, the protocol should be t3.
server.login.id	Login ID of the Agile user who has PPM-related privileges to run the utility, typically the admin user.
server.login.password	Password of the Agile user.
pe.weekend.days	Weekends configured in the server. This value should be the same as the setting in the agile.properties files.
Database Settings	
db.url	JDBC this driver URL of the database. The format is jdbc.oracle:thin@<db_machine_name>:<port>:<instance_name>
db.username	Agile database username
db.password	Agile database password
Application Server Settings	
agile.dir	The parent directory where the library files for the Agile application are located.
oc4j.dir	Location of the Oracle Application Server, if installed.
wls.dir	Location of the BEA WebLogic Application Server, if installed.

4. Verify that the Agile PLM 9.2.2.4 application is running.
5. On a command line, make sure that the JAVA\_HOME environment variable points to the location of the JDK. If it does not, set the value to the correct location.
6. In the directory where you unzipped the utility files, run install.cmd to start the utility.

**Important** If you configured the PPM Post Upgrade Utility in Agile PLM 9.2.2 and are upgrading to Agile PLM 9.2.2.4, run install upgrade-actualtime.cmd, NOT install.cmd to start the utility.

7. Restart the Agile application server.

# Installing and Configuring Agile Java Client

**This chapter includes the following:**

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## Agile Java Client Requirements

All users need to install JRE 6.0 to use Agile Java Client. JRE 6.0 is available at:

<http://java.sun.com/javase/downloads/index.jsp> (<http://java.sun.com/javase/downloads/index.jsp>)

The server-side deployment files for Agile Java Client are installed with the Agile Application Server.

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Note	The Agile PLM administrator must send users the URL to connect to the Agile Java Client.
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## Installing the Agile Java Client

To use the Agile Java Client, you must have the Java Runtime Environment (JRE) version 6 installed on your client computer. Agile Java Client uses Java Web Start technology to download the software and keep it updated.

**To install the Agile Java Client:**

1. Open your browser and type the following:

<http://<hostname>.<domain>:<port>/JavaClient/start.html>

For example, the URL might look something like this:

<http://plmserver.mycompany.com/JavaClient/start.html>

2. Click Launch.

Java Web Start proceeds to download Java Client files and install them on your computer. This may take a few minutes.

3. If a Security Warning dialog box appears, click Start.
4. If the Agile 9.2.2.4 Desktop Integration dialog box appears, click Yes to integrate the Agile Java Client with your desktop.

You are prompted to log in to the Agile server.

5. Enter your Agile PLM username and password, and then Click OK.

The main Agile Java Client window opens.

## Running Agile Java Client 9.0 and Agile Java Client 9.2.2.4 on the Same Computer

Agile Java Client 9.0 and Agile Java Client 9.2.2.4 require different versions of the Java Runtime Environment (JRE). Agile Java Client 9.0 requires JRE 1.4.2, whereas Agile Java Client 9.2.2.4 requires JRE 6.0.

If you have both JRE 1.4.2 and JRE 6.0 installed on the same computer, you need to configure the Agile 9.0 application in Java Web Start to disable JRE 6.0. Otherwise, you will experience problems. For example, you won't be able to add files to the Attachments tab of an object.

### To force Agile Java Client 9.0 to use JRE 1.4.2:

1. Go to the directory where JRE 1.4.2 is installed (such as D:\Program Files\Java\j2re1.4.2\_09), and open the javaws subfolder.
2. Run Java Web Start (javaws.exe).
3. Choose View > Downloaded Applications.
4. Select the Agile 9.0 application.
5. Choose File > Preferences.
6. Click the Java tab.
7. In the Platform Version column, select 1.6. Make sure the Enabled checkbox is unchecked.
8. Click OK.

## Reconfiguring Java Client JNLP Files

When you install the Agile Application Server, the following two JNLP files are configured for the Agile Java Client. These files are embedded with the application.ear file and deployed with the application:

- pcclient.jnlp
- ext.jnlp

A JNLP file is an XML document that describes a Java application to be launched by Java Web Start. Ordinarily, the JNLP files are configured correctly during installation of Agile PLM. However, if you have an application server cluster and are unable to start Java Client and download its classes, you may need to reconfigure the JNLP files to point to the right servers.

## Modifying the JNLP Files

In the AGILE\_HOME\install\bin folder, Agile provides two utilities for unpacking the JNLP files from the application.ear file and repacking them again after you've modified them:

Windows Scripts	UNIX Scripts
ExtractJNLPFiles.cmd	ExtractJNLPFiles.sh

Windows Scripts	UNIX Scripts
RepackJNLPPFiles.cmd	RepackJNLPPFiles.sh

### To extract and modify the Java Client JNLP files:

1. Stop the Web proxy server or load balancer.
2. Stop the Agile Application Server.
3. On the application server computer, open a command prompt window.
4. Run the ExtractJNLPPFiles script to extract the JNLP files from the application.ear file.

AGILE\_HOME\install\bin\ExtractJNLPPFiles

5. Open the pcclient.jnlp file in a text editor. The file is located in the AGILE\_HOME\agileDomain\applications folder.
6. Find the following tags and edit the values listed below in blue:

jnlp:

<jnlp spec="1.0+" codebase="<http://<proxy/loadbalancer>.<domain>:<port>/JavaClient>">

serverURL:

<argument>serverURL=<protocol>://<appserver/loadbalancer>.<domain>:<port>/

<appserver\_virtual\_path></argument>

webserverName:

<argument>webserverName=<proxy/loadbalancer>.<domain>:<port></argument>

where

- <protocol> is the protocol used by the application server. Enter ormi for Oracle Application Server.
- <proxy/loadbalancer> is the Web proxy server hostname or the alias for the load balancer
- <domain> is the fully qualified domain name
- <port> is the Web proxy server port or virtual port for the load balancer.
- <appserver\_virtual\_path> is the Agile Application Server virtual path. The default is "Agile".

7. Save the file.
8. Open the ext.jnlp file in a text editor. The file is located in an OAS or WebLogic subfolder beneath the AGILE\_HOME\agileDomain\applications folder.
9. Find the following tag and edit the values listed below in blue:

jnlp:

<jnlp spec="1.0+" codebase="<http://<proxy/loadbalancer>.<domain>:<port>/JavaClient>">

where

- <proxy/loadbalancer> is the Web proxy server hostname or the alias for the load balancer
- <domain> is the fully qualified domain name
- <port> is the Web proxy server port or virtual port for the load balancer.

10. Save the file.

11. Run the RepackJNLPFiles script to repack the JNLP files into the application.ear file.  
    \AGILE\_HOME\install\bin\RepackJNLPFiles
12. Start the Agile Application Server.
13. Start the Web proxy server or load balancer.

## Opening Multiple Java Clients

If you wish to have the ability to open multiple Java Clients on one machine, perform the following steps before deploying Agile PLM 9.2.2.4 on your application server:

---

**Important** Back up the application.ear file before proceeding.

---

1. On the application server computer, open a command prompt window.
2. Run the ExtractJNLPFiles script to extract the JNLP files from the application.ear file.

    \AGILE\_HOME\install\bin\ExtractJNLPFiles

**Important** If you have an OAS cluster, extract the JNLP files only on the Repository Host Server. When you redeploy the Agile application, the updated JNLP files will be propagated to all servers in the cluster.

3. Open the pcclient.jnlp file in a text editor. The file is located in the  
    AGILE\_HOME\agileDomain\applications folder.
4. Find the following tag:  
    application-desc main-class:  
    <application-desc main-class="com.agile.ui.pcclient.PCClient">
5. Add the following tag to this class:  
    <argument>singleSession=no</argument>
6. Save the file.
7. Run the RepackJNLPFiles script to repack the JNLP files into the application.ear file.

    \AGILE\_HOME\install\bin\RepackJNLPFiles



# Integrating Agile PLM with Oracle AutoVue 19.2c2

**This chapter includes the following:**

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▪ Configuring the AutoVue 19.2c2 Viewer Client Libraries with the Viewer Installer .....	79
▪ Configuring the AutoVue 19.2c2 Viewer Client Libraries Manually .....	79
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## Installing Oracle AutoVue 19.2c2

To install Oracle AutoVue 19.2c2 (Agile Viewer), you must first download the Oracle AutoVue 19.2c2 Desktop Edition product pack as described in "Obtaining Software from Oracle E-delivery." Then, follow the instructions in the *Oracle AutoVue Electro-Mechanical Professional Installation and User Guide*.

## Configuring the AutoVue 19.2c2 Viewer Client Libraries with the Viewer Installer

Follow the instructions in the *Oracle AutoVue Electro-Mechanical Professional Installation and User Guide* to configure the Viewer client libraries.

---

<b>Note</b>	The following instructions are required ONLY if you are integrating Agile PLM on Solaris x86 with Oracle AutoVue 19.2c2.
-------------	--

---

## Configuring the AutoVue 19.2c2 Viewer Client Libraries Manually

### Gathering the Required AutoVue Binaries

1. Copy the html folder from the AGILE\_HOME\AVS directory on the Viewer system to a temporary location.
2. Rename the folder to jVue.
3. Copy the vueServlet.jar file from the AGILE\_HOME\AVS\bin directory on the Viewer system to a temporary location.

4. Copy the jVue.jar, jogl.jar, and gluegen-rt.jar files from the AGILE\_HOME\AVS\html directory on the Viewer system to a temporary location.
5. Copy the com folder from the AGILE\_HOME\agileDomain\deployment\tomcat\applet on the system where the Agile Application Server is installed to the jVue folder previously created.

## Configuring the Agile Application Server

1. Use the ExtractArchive utility, located in the AGILE\_HOME\install directory, to unpack the AGILE\_HOME\agileDomain\applications\application.ear file.
2. Add the jVue folder, created in the previous section, to the ExpandedWar directory of the application.war file, located inside of the application.ear file.  
The path should be as follows:  
AGILE\_HOME\agileDomain\applications\ExpandedEar\ExpandedWar.
3. Add the vueservlet.jar, jVue.jar, jogl.jar, and gluegen-rt.jar files, copied in the previous section, to the \WEB-INF\lib directory of the application.war file's ExpandedWar directory.
4. Use the RepackArchive utility, located in the AGILE\_HOME\install directory, to repack the application.ear file.
5. Undeploy the Agile application from Oracle Application Server.  
To do this, follow these steps.
  - a. Make sure Oracle Application Server is still running.  
To check OAS status, open a command prompt window, change to ORACLE\_HOME\opmn\bin directory, and run opmnctl status. If OAS isn't running, run opmnctl startall.
  - b. From a command prompt window, change to the AGILE\_HOME\agileDomain\bin directory.
  - c. Run UndeployAgilePLM <OC4JAdmin Password> to undeploy the Agile application.
6. Open a Command Prompt window and change to the AGILE\_HOME\agileDomain\bin directory.
7. Run DeployAgilePLM <OC4JAdmin Password> to deploy the Agile PLM application.

## Configuring the File Manager

1. Stop the Tomcat Service.
2. Delete the deployed folder of your file manager, located at AGILE\_HOME\Tomcat\webapps. The name of this deployed folder is equivalent to the name of the Virtual Path entered for File Manager during installation. The default folder name is Filemgr.
3. Add the jVue folder, created the previous section, to the webfs.war file, located at AGILE\_HOME\agileDomain\applications.
4. Add the vueServlet.jar, jVue.jar, jogl.jar, and gluegen-rt.jar files copied in the previous section to the \WEB-INF\lib directory, located inside the AGILE\_HOME\agileDomain\application\webfs.war file.
5. Set the Agile Viewer Host Name and Port Number in the web.xml file, located inside the AGILE\_HOME\agileDomain\applications\webfs.war at the \WEB-INF\ path.

```
<servlet-name>VueServlet</servlet-name>
```

```
<servlet-class>com.cimmetry.servlet.VueServlet</servlet-class>
<init-param>
  <param-name>JVueServer</param-name>
  <!--<param-value>hcmweb:5099</param-value>-->
  <param-value>view_server_host_name:port</param-value>
</init-param>
```

6. Start the File Manager.
7. Check the VueServer Connection on the File Server Configuration page with the following [URL](http://<fileserver host>:<port>/<fileserver virtual path>/Configuration):  
<http://<fileserver host>:<port>/<fileserver virtual path>/Configuration>

---

**Note** Repeat the steps in this section on ALL File Managers.

---



# Agile PLM Service Pack Installation

**This Appendix includes the following:**

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▪ Installing an Agile PLM Service Pack on Windows.....	83
▪ Installing an Agile PLM Service Pack on UNIX.....	86

## Install and Test Notice

**Important** Install and test this release on a designated development server before installing it on your production environment. Your development environment should mirror your production environment as closely as possible to provide accurate testing results. It is important to validate the installation of this release, and confirm your integrations are working correctly as part of your minimum due diligence. Any problems or questions noted during your development system testing should be resolved before installing this release on your production environment.

## Installing an Agile PLM Service Pack on Windows

### Upgrade Requirements

Before you install an Agile PLM service pack, make sure your system meets the following requirements:

### Operating System

- Windows 2003 SP1 and later

### Supported Application Upgrade Path

The Agile PLM application upgrade path is from the following release:

- Agile PLM 9.2.2.4 and all supported hot fixes

**Important** If you are upgrading to Agile PLM 9.2.2.5 on a multi-byte character operating system, see the Agile PLM Readme for an important workaround.

### Upgrading the File Manager

8. If there is no distributed file server network, stop here and go to Upgrading the Application

Server. Otherwise, continue with the following steps.

9. Stop the file server and Apache or IIS admin services.
10. Back up the existing deployed application, Filemgr, if present:
  - a. Change to the AGILE\_HOME\Tomcat\webapps directory.
  - b. Verify there is a directory named Filemgr under the webapps directory.
  - c. If the Filemgr directory exists, then perform the following:

```
cd ..  
mkdir webapps.old  
mv webapps\Filemgr webapps.old
```
11. Download Agile922x\_Win.exe to a temporary folder.
12. Download and extract the contents of the 9.2.2.x\_Platforms.zip file to the same location as the Agile922x\_Win.exe file.
13. In the temporary file, double-click Agile922x\_Win.exe.  
The Install Window appears.
14. Click Done to finish the installation.

---

**Note** If you are using AutoVue, see Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x for the instructions for your version and platform.

---

15. Repeat the steps in this section on each distributed file server.
16. Start Apache or IIS admin services, if configured.

## Upgrading the SDK Client

1. If the SDK Client is installed on the same machine as the application server, stop here and go to Upgrading the Application Server. Otherwise, continue with the following steps.
2. On the system where the SDK Client is installed, download Agile922x\_Win.exe to a temporary folder.
3. Download and extract the contents of the 9.2.2.x\_Platforms.zip file to the same location as the Agile922x\_Win.exe file.
4. In the temporary folder, double-click Agile922x\_Win.exe.  
The Install window appears.
5. Click Done to finish the installation.

## Upgrading the Application Server

1. Undeploy the Agile Application:
  - a. Make sure Oracle Application Server is still running.  
To check OAS status, open a command prompt window, change to oracle\_home\opmn\bin directory, and run opmnctl status. If OAS isn't running, run opmnctl startall.
  - b. From a command prompt window, change to the AGILE\_HOME\agileDomain\bin directory.
  - c. Run UnDeployAgilePLM <OC4JAdmin Password>.
  - d. From the same command prompt window, run cleanup <OC4JAdmin Password>.

2. If you are upgrading the Agile Application in a cluster, undeploy the application on the Primary Server. The application is automatically undeployed on the secondary servers.
3. Stop the OPMN processes from the Oracle home directory:
  - a. Open a command prompt window.
  - b. Stop the Oracle Application Server instance:
 

```
\oracle_home\opmn\bin\opmnctl stopall
```
4. Verify that the application server, the Apache or IIS Admin Service, and any additional Agile services are stopped.
5. On the system where the application server is installed, download Agile922x\_Win.exe to a temporary folder.
6. Download and extract the contents of the 9.2.2.x\_Platforms.zip file to the same location as the Agile922x\_Win.exe file.
7. In the temporary folder, double-click Agile922x\_Win.exe.

The Install window appears.

If you are upgrading the Agile Application in a cluster, install the application on all servers in the cluster.

8. Click Done to finish the installation.

---

Note	If you are using AutoVue, see Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x for the instructions for your version and platform.
------	--

---

9. Restart the Oracle Application Server instance:

\oracle\_home\opmn\bin\opmnctl startall

10. Check the status of the Oracle Application Server instance:

\oracle\_home\opmn\bin\opmnctl status

---

Note	Make sure the database schema is compatible with Agile PLM 9.2.2.x before starting the application server. See the <i>Database Upgrade Guide</i> for the schema version.
------	--

---

11. Deploy the Agile application:

- a. From a command prompt window, change to the \AGILE\_HOME\agileDomain\bin directory and run configure <OC4JAdmin Password>.
- b. From the same command prompt window, run DeployAgilePLM <OC4JAdmin Password>.

When deployment is finished, the script prompts that the Agile application has been deployed.

If you are upgrading the Agile Application in a cluster, deploy the application on the Primary Server. The application is automatically deployed on the secondary servers.

12. Check the default\_group~home~default\_group~1.log file in the following directory to verify that the Agile application is deployed:

\oracle\_home\opmn\logs\

13. Start the Apache or IIS Admin Service.

## Post-Installation Verification

### Application Server

#### 9.2.2.5:

In the application menu under Help | About Agile, Update Versions should contain 9.2.2.5 and Agile Version should contain 9.2.2.5.12.

### File Manager

Start the File Manager before performing the following steps:

1. Type [http://<localhost:8080>/<fileserver\\_virtual\\_path>/Configuration](http://<localhost:8080>/<fileserver_virtual_path>/Configuration) to display the File Manager Configuration page.
2. Confirm all lines show success.

## Installing an Agile PLM Service Pack on UNIX

### Upgrade Requirements

Before you install an Agile PLM service pack, make sure your system meets the following requirements:

### Operating System

- Solaris 9 or 10
- Red Hat Linux 4
- IBM AIX 5.3

### Supported Application Upgrade Path

The Agile PLM application upgrade path is from the following release:

- Agile PLM 9.2.2.4 and all supported hot fixes

**Important** If you are upgrading to Agile PLM 9.2.2.5 on a multi-byte character operating system, see the Agile PLM Readme for an important workaround.

### Upgrading the File Manager

3. If there is no distributed file server network, stop here and go to Upgrading the Application Server. Otherwise, continue with the following steps.
4. Stop the file server and any additional Agile processes.
5. Back up the existing deployed application, Filemgr, if present:
  - a. Change to the AGILE\_HOME/Tomcat/webapps directory.



- b. Verify there is a directory named Filemgr under the webapps directory.
- c. If the Filemgr directory exists, then perform the following:

```
cd ..  
mkdir webapps.old  
mv webapps/Filemgr webapps.old
```
- 6. Download the upgrade file to a temporary directory.  
Solaris (SPARC): Agile922x\_Sol.bin  
Solaris (X86): Agile922x\_Solx86.bin  
Linux: Agile922x\_Lin.bin  
AIX: Agile922x\_AIX.bin
- 7. Download and extract the contents of the 9.2.2.x\_Platforms.zip file to the same location as the upgrade file.
- 8. From the temporary directory, run the upgrade file.  
The Install Window appears.
- 9. Click Done to finish the installation.

---

**Note** If you are using AutoVue, see Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x for the instructions for your version and platform.

---

- 10. Repeat the steps in this section on each distributed file server.

## Upgrading the SDK Client

- 1. If the SDK Client is installed on the same machine as the application server, stop here and go to Upgrading the Application Server. Otherwise, continue with the following steps.
- 2. On the system where the SDK Client is installed, download the upgrade file to a temporary directory.  
Solaris (SPARC): Agile922x\_Sol.bin  
Solaris (x86): Agile922x\_Solx86.bin  
Linux: Agile922x\_Lin.bin  
AIX: Agile922x\_AIX.bin
- 3. Download and extract the contents of the 9.2.2.x\_Platforms.zip file to the same location as the upgrade file.
- 4. From the temporary directory, run the upgrade file.  
The Install window appears.
- 5. Click Done to finish the installation.

## Upgrading the Application Server

1. Undeploy the Agile Application:
  - a. Make sure Oracle Application Server is still running.

To check OAS status, open a command prompt window, change to `oracle_home/opmn/bin` directory, and run `opmnctl status`. If OAS isn't running, run `opmnctl startall`.
  - b. From a command prompt window, change to the `AGILE_HOME/agileDomain/bin` directory.
  - c. Run `UnDeployAgilePLM.sh <OC4JAdmin Password>`.
  - d. From the same command prompt window, run `cleanup.sh <OC4JAdmin Password>`.
2. If you are upgrading the Agile Application in a cluster, undeploy the application on the Primary Server. The application is automatically undeployed on the secondary servers.
3. Stop the OPMN processes from the Oracle home directory:
  - a. Open a terminal window.
  - b. Stop the Oracle Application Server instance:

```
/oracle_home/opmn/bin/opmnctl stopall
```
4. Verify that the application server, the Apache web server, and any additional Agile processes are stopped.
5. On the system where the application server is installed, download the upgrade file to a temporary directory.

Solaris (SPARC): `Agile922x_Sol.bin`  
Solaris (X86): `Agile922x_Solx86.bin`  
Linux: `Agile922x_Lin.bin`  
AIX: `Agile922x_AIX.bin`
6. Download and extract the contents of the `9.2.2.x_Platforms.zip` file to the same location as the upgrade file.
7. From the temporary directory, run the upgrade file.

The Install window appears.

If you are upgrading the Agile Application in a cluster, install the application on all servers in the cluster.
8. Click Done to finish the installation.

---

Note	If you are using AutoVue, see Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x for the instructions for your version and platform.
------	--

---
9. Restart the Oracle Application Server instance:

```
/oracle_home/opmn/bin/opmnctl startall
```
10. Check the status of the Oracle Application Server instance:

```
/oracle_home/opmn/bin/opmnctl status
```

---

Note	Make sure the database schema is compatible with Agile PLM 9.2.2.x before starting the application server. See the <i>Database Upgrade Guide</i> for the schema version.
------	--

---

11. Deploy the Agile application:
  - a. From a command prompt window, change to the /AGILE\_HOME/agileDomain/bin directory and run `configure.sh <OC4JAdmin Password>`.
  - b. From the same command prompt window, run `DeployAgilePLM.sh <OC4Jadmin Password>`.

When deployment is finished, the script prompts that the Agile application has been deployed.

If you are upgrading the Agile Application in a cluster, deploy the application on the Primary Server. The application is automatically deployed on the secondary servers.

12. Check the `default_group~home~default_group~1.log` file in the following directory to verify that the Agile application is deployed:

`/oracle_home/opmn/logs/`

13. If the web server is installed on the same machine as the application server, restart the web server.
14. If you are running in a clustered environment, repeat these steps on each application server.

## Post-Installation Verification

### Application Server

#### 9.2.2.5:

In the application menu under Help | About Agile, Update Versions should contain 9.2.2.5 and Agile Version should contain 9.2.2.5.12.

### File Manager

Start the File Manager before performing the following steps:

1. Type [http://<localhost:8080>/<fileserver\\_virtual\\_path>/Configuration](http://<localhost:8080>/<fileserver_virtual_path>/Configuration) to display the File Manager Configuration page.
2. Confirm all lines show success.



# Agile PLM Installer Panels

**This Appendix includes the following:**

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▪ Viewer Panels.....	95
▪ File Manager Panels.....	95

## Common Agile PLM Installer Panels

The following Agile PLM installer panels are common to all components:

Panel	Step(s) to Perform
Welcome	Click <b>Next</b> .
License Agreement	Read the Agile PLM license agreement, and then select <b>I accept the terms of the license agreement</b> .
Customer Information	Enter your user name and company name.
Choose Install Component(s)	Select the components to install.  When you select each component, a description of it appears in the Description box.
Installation Mode	Select Basic Mode (default) or Advanced Mode installation. Basic mode installs a standalone application server on Oracle Application Server only with minimal user input. Advanced Mode allows you to install a standalone or cluster system on Oracle Application Server or BEA WebLogic.
Installation Location	Enter the directory where you want to install Agile PLM components. This directory is also referred to as the Agile_Home.
Choose Shortcut Folder	Depending on your operating system, select where you would like to create links or product icons for Agile PLM. These shortcuts allow you to quickly launch Agile PLM programs.  <b>Windows users:</b> To create Agile PLM icons for all users, make sure the <b>Create Icons for All Users</b> box is checked.
Pre-Installation Summary	Review the information you provided in previous panels to make sure it's correct before you install.  If the information is correct, click <b>Install</b> . If you need to make any changes, click <b>Previous</b> to go to a previous panel.

Panel	Step(s) to Perform
Install Complete	<p>You have finished Agile PLM installation.</p> <p>Click <b>Done</b> to close the installer.</p> <p><b>Windows users:</b> Depending on the components you installed, your computer may restart when you click <b>Done</b>.</p>

## Database Details Panel

The following Agile PLM installer panel appears to obtain database details:

Panel	Step(s) to Perform
Agile PLM Database Details	<p>Enter your Agile PLM database information. If you do not know these values, see the database administrator responsible for your Agile PLM database server.</p> <p><b>Agile Database Host Name</b></p> <p>The fully qualified domain name of the computer where the Agile PLM database server is installed.</p> <p><b>Agile Database Port</b></p> <p>For Oracle, the default TNS Listener port is 1521.</p> <p><b>Agile Database SID</b></p> <p>Enter the Oracle System Identifier that refers to the instance of the Oracle database running on the server. The default SID is agile9.</p> <p><b>Agile Database User</b></p> <p>Enter the database user. The default user is agile.</p> <p><b>Agile Database User Password</b></p> <p>Enter the password for the Agile PLM database user. The default password is tartan.</p> <hr/> <p><b>Note</b> If your Agile PLM database is configured to use different values from the defaults listed above, specify that information instead.</p> <hr/>

## Application Server Panels

The following Agile PLM installer panels appear when you install the Application Server:

Panel	Step(s) to Perform
-------	--------------------

Panel	Step(s) to Perform
Application Server Type	<p>Select the type of application server you are using. Agile PLM supports Oracle Application Server 10g (10.1.3.1.0) and BEA WebLogic Server 8.1 SP6.</p> <hr/> <p><b>Important</b> The application server you select should be installed <b>BEFORE</b> you install Agile PLM. On Windows, you can install Oracle Application Server10g through the Agile PLM installer.</p> <hr/>
Installation Type	<p>Select <b>Standalone Installation</b> or <b>Cluster Installation</b>.</p> <hr/> <p><b>Note</b> If you are installing Application Server and File Manager on the same computer, selecting <b>Cluster Installation</b> will cause both to be clustered. A standalone installation requires only a single server, and therefore may not be as scalable or as reliable.</p> <hr/> <p>A cluster is a group of servers that work together to provide a more scalable, more reliable application platform than a single server. A cluster appears to its clients as a single server, but is actually a group of servers acting as one. A cluster can provide two key advantages over a single server:</p> <ul style="list-style-type: none"> <li>▫ <b>Scalability:</b> The capacity of a cluster is not limited to a single server or a single machine. New servers can be added to the cluster dynamically to increase capacity. If more hardware is needed, a new server on a new machine can be added.</li> <li>▫ <b>High-Availability:</b> A cluster uses the redundancy of multiple servers to insulate clients from failures. The same service can be provided on multiple servers in the cluster. If one server fails, the surviving members can continue to serve the application. The ability to fail over from a failed server to a functioning server increases the availability of the application to clients.</li> </ul>
Oracle Application Server Home	<p>Enter the directory where Oracle Application Server is installed, or where you plan to install it. This directory is also referred to as the Oracle Home.</p> <hr/> <p><b>Important</b> If you are installing an Oracle Application Server cluster, all servers in the cluster must use the same operating system.</p>
Oracle Application Server Information	<p>Enter details for your Oracle Application Server installation.</p> <p><b>AS Home Name</b> Enter the OAS home name (not the directory location).</p> <p><b>AS Instance Name</b> Enter the OracleAS 10g instance name (for example, oas).</p> <p><b>AS Admin Password</b> Enter the password for the OracleAS 10g administration user, oc4jadmin. It must be at least five characters and it must contain one number.</p> <p><b>Note</b> Enter the OC4JAdmin password specified during the installation of OAS.</p>

Panel	Step(s) to Perform
Oracle Application Server 10g Setup Path	Enter the path where the Oracle Application Server 10g installation program is located. Click <b>Choose</b> to browse to the path.
Application Server Information	Enter the Application Server information.  Host Name  Enter the fully qualified domain name of the Application Server.
Clustered Application Server Type	Choose the type of clustered Application Server <ul style="list-style-type: none"> <li>▫ Primary Server</li> <li>▫ Secondary Server</li> </ul>
▫ Multicast Information	Enter the multicast address and port number which are used as a part of the dynamic discovery mechanism for managing Oracle nodes in a cluster environment. <ul style="list-style-type: none"> <li>▫ All of the nodes in the cluster topology must be configured to use the same multicast address and port number.</li> <li>▫ The multicast address must be within the valid address range from 224.0.1.0 to 239.255.255.255.</li> </ul>

## Web Server Panels

The following Agile PLM installer panels appear when you install Agile Proxies:

Panel	Step(s) to Perform
Apache Home Directory	Enter the Apache Web Server home directory.  You can click <b>Choose</b> to browse to the Apache home directory.  <hr/> <b>Note</b> If you are installing Agile PLM on Oracle Application Server (OAS), DON'T select the home directory for Oracle HTTP Server, a version of Apache Web Server that is included with OAS. <hr/>



Panel	Step(s) to Perform
<b>Web Server Information</b>	<p>Enter information for the Web server used to proxy Agile PLM. If you are using a load balancer, specify the alias and virtual port for it instead.</p> <p><b>Host Name</b></p> <p>Enter the fully qualified domain name (for example, computer-name.company.com) of the Web server. If you are using a load balancer, specify the alias for the load balancer virtual IP address.</p> <p><b>Port Number</b></p> <p>Enter the HTTP or HTTPS port used by the Web server. General Web access is typically available on port 80, but your deployment may use a different port. If you are using a load balancer, specify the virtual port number of the load balancer.</p>

## Viewer Panels

The following Agile PLM installer panel appears when you install the File Manager:

Panel	Step(s) to Perform
<b>Agile Viewer</b>	<p>Enter Agile Viewer information.</p> <p><b>Host Name</b></p> <p>Enter the fully qualified domain name (for example, computer-name.company.com) of the Viewer.</p> <p><b>Port Number</b></p> <p>Enter the port used by the Viewer. The default port is 5099, but your deployment may use a different port if 5099 is not available.</p>

## File Manager Panels

The following Agile PLM installer panels appear when you install File Manager:

Panel	Step(s) to Perform
<b>File Manager User Authentication</b>	<p>A user account is used by the File Manager to communicate with the Application Server and its peers. You can use the default internal account or create a separate user account.</p> <p>Choose the type of user account you want to use for authentication.</p>

Panel	Step(s) to Perform
<b>File Manager User Account</b>	<p>The File Manager user account is used by the File Manager to communicate with the Application Server and its peers. The default user account is ifuser.</p> <p><b>File Manager User Name</b></p> <p>Enter the user account used to communicate with the Application Server (default:ifuser).</p> <p><b>File Manager User Password</b></p> <p>Enter the File Manager user password (default:agile).</p>
<b>File Manager Storage Location</b>	<p>Enter the directory where the File Manager files are stored. Click <b>Choose</b> to browse to the path.</p> <hr/> <p><b>Note</b>      Make sure the directory you specify is one to which you have write access. For clustered File Managers, you must specify a network location.</p> <hr/>
<b>File Manager Virtual Path</b>	<p>Enter the virtual path used to connect to the Agile File Manager. The default virtual path is "Filemgr", but you can change it to something appropriate for your company.</p> <p>The complete path for your Agile File Manager will be  <a href="http://&lt;web_server&gt;:&lt;port&gt;/&lt;file_manager_virtual_path&gt;/AttachmentServlet">http://&lt;web_server&gt;:&lt;port&gt;/&lt;file_manager_virtual_path&gt;/AttachmentServlet</a>.</p> <p>Important: The virtual path for Agile File Manager should be different from the virtual path for the Agile Application Server, especially if they use the same proxy server. The virtual paths should also have a different prefix. For example, if the Agile Application Server Virtual Path is "Agile", the name of the Agile File Manager Virtual Path must start with something other than "Agile".</p>
<b>Agile File Manager</b>	<p>Enter the machine name where File Manager is installed as well as the port number.</p> <p><b>Agile File Manager Host Name</b></p> <p>Enter the fully qualified domain name of the machine where you are installing the File Manager.</p> <p><b>Agile File Manager Port Number</b></p> <p>Enter the port number on which other Agile PLM applications will connect to the File Manager. The default port is 8080.</p> <p>If the File Manager is accessed through a proxy server or load balancer, enter the host name and port number of that machine.</p>
<b>Application Server Virtual Path</b>	<p>Enter the virtual path used to connect to the Agile Application Server. The default virtual path is "Agile", but you can change it to something appropriate for your company.</p> <p>The complete path for your Agile Application Server will be  <a href="http://&lt;web_server&gt;:&lt;port&gt;/&lt;appserver_virtual_path&gt;/PLMServlet">http://&lt;web_server&gt;:&lt;port&gt;/&lt;appserver_virtual_path&gt;/PLMServlet</a>.</p> <p>The virtual path for Agile Application Server should be different from the virtual path for the Agile File Manager, especially if they use the same proxy server.</p>





# Agile Application Server Scripts

**This Appendix includes the following:**

- Installation and Configuration Scripts ..... 99
- Application Scripts ..... 99
- File Vault Utilities ..... 100

## Installation and Configuration Scripts

Agile provides several scripts that can be used during installation and configuration of the Agile Application Server. The scripts are installed into the AGILE\_HOME\install\bin directory:

Windows Script	UNIX Script	Description
ExtractArchive.cmd	ExtractArchive.sh	Extracts all of the files in the Agile application.ear file.
ExtractConfigFiles.cmd	ExtractConfigFiles.sh	Extracts configuration files from the Agile application.ear file.
ExtractJavaClient-Files.cmd	ExtractJavaClient-Files.sh	Extracts all of the Java Client files from the Agile application.ear file.
ExtractJNLPFiles.cmd	ExtractJNLPFiles.sh	Extracts JNLP files for Java Client from the Agile application.ear file.  A JNLP file is an XML document that describes a Java application to be launched by Java Web Start. To successfully download and install Java Client using Java Web Start, you must configure the JNLP MIME type for your server.
RepackArchive.cmd	RepackArchive.sh	Repacks all of the files into the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RepackConfigFiles.cmd	RepackConfigFiles.sh	Repacks configuration files into the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RepackJavaClient-Files.cmd	RepackJavaClient-Files.sh	Repacks all Java Client files into JavaClient.war, and then updates the JavaClient.war file contained in the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RepackJNLPFiles.cmd	RepackJNLPFiles.sh	Repacks JNLP files for Java Client into the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.

## Application Scripts

Agile provides several scripts for deploying and starting the Agile application. The scripts are installed into the AGILE\_HOME\agileDomain\bin directory:

Windows Script	UNIX Script	Description
checkLDAPConfig.cmd	checkLDAPConfig.sh	Tries to connect to the Directory Server and verify whether LDAP configuration is correct.
DeployAgilePLM.cmd	DeployAgilePLM.sh	Deploys the Agile application on Oracle Application Server 10g.
encryptpwd.cmd	encryptpwd.sh	Encrypts a password.
configure.cmd	configure.sh	Configures the Agile application-related JMS settings.
migrateUsersToDB.cmd	migrateUsersToDB.sh	Migrates users from the Directory Server to the Agile PLM database. After you run this script, make sure to restart your application server.
setEnv.cmd	setEnv.sh	Sets common environment variables used to run other Agile scripts.
cleanup.cmd	cleanup.sh	Removes the Agile application-related JMS settings.
UnDeployAgilePLM.cmd	UnDeployAgilePLM.sh	Undeploys the Agile application on Oracle Application Server 10g.

## File Vault Utilities

Agile provides several utilities to use with the File Vault. The utilities are installed in the `AGILE_HOME\agileDomain\tools` directory.

### iFSReorgV2

Used to restructure the file vault during an upgrade from a version prior to Agile PLM 9.2.1.

Usage: `java -jar iFSReorgV2.jar -basedir <value> -oldFilePrefix <value> [-newFilePrefix <value>] [-logging <true/false>] [-simulate <true/false>]`

where

- `basedir` is the file vault location to be reorganized
- `oldFilePrefix` is the old file name prefix for the existing files in the vault
- `newFilePrefix` is the new file name prefix. All of the existing files will be renamed with this prefix. This is an optional argument. If it is not specified, the old file name prefix is used.
- `logging` enables logging of warnings or errors if set to true. The log is saved to a file named `ifsReorg.log`.
- `simulate` simulates the reorganization process without actually moving or renaming the files.

### MetaFilesRemover

Used to periodically remove metafiles from the file vault based on the last used date or size. This utility should be used when upgrading the Agile Viewer.

---

**Note**      A user-created `.cmf` file should not be listed or removed from the file vault.

---

Usage: java -jar MetaFilesRemover.jar [-delete <value>] [-age <value>] [-size <value>] -basedir <value> -prefix <value> -serverURL <value> -username <value> -password <value>

where

- delete deletes the metafiles.
- age specifies the last access time (day).
- size specifies file size (KB).
- basedir is the file vault location where the metafiles are removed.
- prefix is the file name prefix.
- serverURL is the location of the DMS service, for example, <http://server.company.com:80/Agile/services/DmsService>.
- username is the DMS service username.
- password is the DMS service password.

## MetalItemGenerator

Used to generate new metafiles for a file vault and should be used when upgrading Agile PLM or the Agile Viewer. The utility simulates offline metafile generation from all of the files in the vault and supports the primary file server, but not structured files.

Usage: java -jar MetalItem.jar -basedir <value> -filePrefix <value> -serverURL <value> -defaultUser <value> -defaultPassword <value> [-logging <true/false>]

where

- basedir is the file vault location where the metafiles are generated.
- filePrefix is the file prefix of the files in the vault.
- serverURL is the URL of the server where the metafiles are persisted.
- defaultUser is the default userid of the Agile system.
- defaultPassword is the password of the default Agile user.
- logging enables logging. All information is saved in the metalItem.log file. By default, logging is disabled.

## metaUtility

Displays the number of files in the meta generation queue through a graphical user interface.

Usage: java -jar metaUtility.jar

## VaultSimulation

Used to create a virtual vault from a database.

Usage: java -jar VaultSimulation.jar -VaultLoc <value> -URL <value> -userid <value> -password <value> [-prefix <value>]

where

- VaultLoc is the file vault location.
- URL is the database location.
- userid is the database userid.
- password is the database password.
- prefix is the file name prefix. The default is Agile.

## DeadFilesLocator

Used to locate dead files, including markups, in a file vault and shows how many files are missing in a specific distributed file management server. Dead files are automatically moved from the file vault to an archive folder.

Usage: java -jar DeadFilesLocator.jar -attachmentPrefix <value> -vaultRoot <value> [-moveProblemFiles <Y/N>] [-archiveFileDest <value>] [-db\_url <value>] [-db\_user <value>] [-db\_password <value>] [-file <value>] [-VERBOSE <true/false>]

where

- attachmentPrefix is the file name prefix.
- vaultRoot is the absolute path of the vault root.
- moveProblemFiles determines the action for the dead files.
- archiveFileDest is the fully qualified path to an existing directory where you want to move the dead files.
- db\_url is the URL of the database.
- db\_user is the name of the database user.
- db\_password is the password of the database user.
- file is the absolute path to the agile.properties file.

## MissingFilesLocator

Used to locate missing files, including redlined files, in a file vault, but not limited to a specific distributed file management server.

Usage: java -jar MissingFilesLocator.jar -dburl <value> -dbuserid <value> -dbpassword <value> -ifsuser <value> -ifspassword <value> [-force <value>]



where

- dburl is the URL of the database.
- dbuserid is the name of the database user.
- dbpassword is the password of the database user.
- ifsuser is the name of the file vault user
- ifspassword is the password of the ifs user.
- force forces the utility to continue even if the file server is offline.

## FixFileSize

Corrects the file sizes in the database. The file size is determined based on the actual files in the vault, then corrects the size in the database. If the file size equals zero during an upgrade, the file size is returned to its original value after running this utility.

Usage: java -jar FixFileSizeUtility.jar -dburl <value> -dbuserid <value> -dbpassword <value> -ifsuser <value> -ifspassword <value> [-log]

where.

- dburl is the URL of the database.
- dbuserid is the name of the database user.
- dbpassword is the password of the database user.
- ifsuser is the name of the file system user.
- ifspassword is the password of the file system user.



# Agile System Maintenance

**This Appendix includes the following:**

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▪ Performance Tuning .....	105
▪ Configuring Access to Objects using Agile Administrative Settings .....	107
▪ Color Settings .....	108
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## Using the Server as a Client

After installation, test Agile PLM on the server to make sure that client systems can start Agile products. You may also need to test Agile administration modifications as well. For best results, apart from this testing, do *not* use the Agile PLM server to perform data-related tasks such as creating and modifying Items and Changes.

## Performance Tuning

This section provides some information on how to tune the application server to improve the performance of Agile PLM.

### Tuning JVM Parameters

Oracle Application Server Containers for J2EE (OC4J) is a Java process that requires a Java virtual machine (JVM) to run. You can fine-tune your system's JVM settings to improve memory management and garbage collection.

JVM settings for OC4J are contained in the oracle\_home\opmn\conf\opmn.xml file. To find JVM settings, look for the following lines in that file:

```
<ias-component id="OC4J">
  <process-type id="home" module-id="OC4J" status="enabled">
    <module-data>
      <category id="start-parameters">
        <data id="java-options" value="<enter JVM settings here>" />
      </category>
    </module-data>
  </process-type>
</ias-component>
```

**Important** If you modify the opmn.xml file, you must restart Oracle Application Server.

The following table provides recommended JVM settings for the Agile Application Server:

Parameter	Description	Windows	UNIX	Comments
-----------	-------------	---------	------	----------

Parameter	Description	Windows	UNIX	Comments
Xms	Minimum Heap Size	1024m	1024m	The Minimum and Maximum Heap Sizes should be set to the same value. On Windows, the maximum value that can be safely set is 1536m. On UNIX, there is often a higher limit, but the typical recommendation is to have the heap sized at 2048m.
Xmx	Maximum Heap Size	1024m	1024m	
XX:MaxPermSize	Maximum space for permanent objects	256m	256m	
XX:NewSize	Initial memory size for new objects	256m	256m	
XX:MaxNewSize	Maximum memory size for new objects	256m	256m	
VMType	Hotspot or server	hotspot	server	On Windows, -hotspot option gives the best results. On UNIX, -server option gives the best results

---

**Note** The Agile PLM installer adjusts JVM parameters to the following values if available physical memory of the machine exceeds 1.5Gb:

---

`-Xms1024m -Xmx1024m -XX:MaxPermSize=256m -XX:NewSize=256m -XX:MaxNewSize=256m`

For more information about how to tune JVM settings for OC4J, see the *Oracle Application Server Performance Guide*. Also see "Performance Documentation for the Java Hotspot VM" available at the Sun Developer Network: <http://java.sun.com/docs/hotspot/index.html>

## Tuning Oracle HTTP Server

This section describes how to tune Oracle HTTP Server to improve Agile PLM performance. The main configuration file for Oracle HTTP Server is `httpd.conf`. It is located in the following directory:

Windows: `oracle_home\Apache\Apache\conf`

UNIX: `oracle_home/Apache/Apache/conf`

Open the `httpd.conf` file to edit it. You can use any text editor.

In the `httpd.conf` file, search for the following parameters: `ThreadsPerChild` and `MaxClients`. The recommended settings are shown below:

```
# Number of concurrent threads (i.e., requests) the server will allow.
# Set this value according to the responsiveness of the server (more
# requests active at once means they're all handled more slowly) and
# the amount of system resources you'll allow the server to consume.
#
```

```
ThreadsPerChild 25 (for every 2 CPUs on the Application Server)
#
# Limit on total number of servers running, i.e., limit on the number
# of clients who can simultaneously connect --- if this limit is ever
# reached, clients will be LOCKED OUT, so it should NOT BE SET TOO LOW.
# It is intended mainly as a brake to keep a runaway server from taking
# the system with it as it spirals down...
#
MaxClients 25 (for every 2 CPUs on the Application Server)
```

Important If you modify the httpd.conf file, you must restart Oracle Application Server.

## Configuring Access to Objects using Agile Administrative Settings

Access to Agile objects is controlled through the roles and privileges you grant users using the Agile web client administrative settings. Before allowing any external access to your Agile servers, you must first consider who needs access and what they need to access.

The list of potential external users may include, but is not limited to:

- Contract manufacturers
- Suppliers
- Customers
- Licensees
- Remote manufacturing facilities
- Field service personnel
- Traveling employees

Allowing access to third-party companies, such as contract manufacturers, may require special consideration. Most likely, you do not want these users to have access to *all* of your product information. Instead, you may want to grant them access to only a small subset of your data. For instance, they may need access only to data about products that they build for you.

Agile recommends that you create a role using the Agile Java client administrative settings for each different type of external user. Once the role is defined, users can be assigned to the role. All users assigned to the role will inherit the privileges that are assigned to the role.

The Agile Web client administrative settings includes with a role called Example - Subcontractor that can be used as a template for setting up access for external users. For more information, see the *Agile Administrator Guide*.

You can take this one step further, and create a Page Two field on all Items and Changes called External User. This field can be filled with any external usernames that are allowed to access each Item or Change. A privilege can then be created for each role that allows access only to objects based on the value of this field. For instance, privileges can be created and granted so that Acme

CEM employees can read only objects that have the value Acme in the External User field.

## Configuring Your Firewall

Most likely, your Agile servers are located behind your corporate firewall. An important part of system security is allowing incoming connections from the Agile web client to Agile Application Server and Agile Viewer, while restricting access to other parts of your system.

## Color Settings

For best support of the current Agile PLM color-coded user interface, set client computers to display more than 256 colors.

## Dynamic Versus Static IP Addresses

You can use dynamic IP addresses with “long-term lease” assignments, as well as static addresses, for Oracle systems. For best results, do not change the hostname of computers in the system, and use static addresses for all servers.

## Checking Your TCP/IP Connection

**To verify that the client computer has a TCP/IP connection to the Web server:**

1. Open a Command Prompt window.
2. In the Command Prompt window, ping the Web server by typing:  
`ping servername`

The system returns a statement similar to the following:

```
Pinging server_name [10.1.1.160] with 32 bytes of data:  
Reply from 10.1.1.160: bytes=32 time =1ms TTL=128
```

This response verifies that your TCP/IP connection is working.

## Configuring Browsers on Client Computers

Agile recommends that all browsers are set to check for newer versions of stored pages every visit to the page.

**To set Internet Explorer to check for newer versions of stored pages every visit to the page:**

1. Open Start > Settings > Control Panel > Internet Options.
2. On the General tab of the Internet Properties dialog box, click Settings in the Temporary Internet files section.
3. Select Check for newer versions of stored pages: Every visit to the page, then Click OK.
4. Click OK to close the Properties dialog box.

# Uninstalling Agile PLM

Follow these instructions to remove Agile PLM 9.2.2.4.

## To remove Agile PLM 9.2.2.4 on Windows:

1. Stop the following services:
  - IIS Admin Service
  - World Wide Web Publishing Service
  - Tomcat
2. Uninstall Tomcat, if applicable.
3. Undeploy the Agile application from Oracle Application Server.

To do this, follow these steps.

- a. Make sure Oracle Application Server is still running.

To check OAS status, open a command prompt window, change to `<OAS_Home>\opmn\bin` directory, and run `opmnctl status`. If OAS isn't running, run `opmnctl startall`.

- b. From a command prompt window, change to the `AGILE_HOME\agileDomain\bin` directory.

---

Note	If you are undeploying the Agile applicaton from a cluster, run the following commands on the primary server. The application is automatically undeployed from the secondary servers.
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- c. Run `UnDeployAgilePLM <OC4JAdmin Password>` to undeploy the Agile application.
- d. Run `cleanup <OC4Jadmin Password>` to remove all Agile-related JMS settings.
4. Choose `Start > All Programs > Agile > Agile 9.2.2.4 > Uninstall Agile 9.2.2.4`.
5. Click `Uninstall` on the `Uninstall Agile` window.
6. Click `Done` when finished.
7. Restart the computer.





# Tuning Memory for Java Applets

### This Appendix includes the following:

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- Java Control Panel ..... 112
- Frequently Asked Questions..... 112

The Agile Web Client uses Java applets for advanced functionality. Examples include the Gantt Chart and the Agile Viewer. These applets use the Java Plug-in to run inside your browser.

The amount of memory an applet requires depends on the content it attempts to load. If you experience memory problems while running the Gantt Chart, the Agile Viewer, or other Java applets, you should increase the amount of memory available to Java applets. To configure Java applet runtime parameters, use the Java Control Panel.

#### To adjust Java applet runtime parameters on Windows:

1. From the Windows Control Panel, run Java to open the Java Control Panel.
2. Click the Java tab.
3. In the Java Applet Runtime Settings box, click View. The Java Runtime Settings dialog box appears.
4. In the Java Runtime Parameters box, add the following:  
`-Xmx<memory-limit>`  
For example, to set maximum available memory to 256Mb, enter `-Xmx256M`.
5. Click OK to close the Java Runtime Settings dialog box.
6. Click OK to close the Java Control Panel.
7. Restart the browser.

#### To adjust Java applet runtime parameters on UNIX:

1. Determine which version of the Java Plug-in the browser is using.
2. Run the script `<java-dir>/jre/bin/ControlPanel` to open the Java Control Panel.
3. Click the Java tab.
4. In the Java Applet Runtime Settings box, click View. The Java Runtime Settings dialog box appears.
5. In the Java Runtime Parameters box, add the following:  
`-Xmx<memory-limit>`  
For example, to set maximum available memory to 256Mb, enter `-Xmx256M`.
6. Click OK to close the Java Runtime Settings dialog box.
7. Click OK to close the Java Control Panel.
8. Restart the browser.

### To adjust Java applet runtime parameters on Mac OS X:

1. Determine which version of the Java Plug-in the browser is using.
2. In Finder, run the Applications > Utilities > Java > Java <java-version> > Plugin Settings command.
3. In the Java Runtime Parameters box, add the following:

`-Xmx<memory-limit>`

For example, to set maximum available memory to 256Mb, enter `-Xmx256M`.

4. Click Apply.
5. Close the control panel, and restart the browser.

## Java Control Panel

For more information about the Java Control Panel and how to configure Java runtime settings on your client computer, go to <http://java.sun.com> (<http://java.sun.com>) and search for “Java Control Panel”.

## Frequently Asked Questions

How much physical available memory do I need to run Agile PLM applets?

Please see the *Agile PLM Capacity Planning and Deployment Guide* for all Agile PLM hardware and software requirements.

In general, you will need at least 256Mb free available memory to use for Java applets. If the machine does not have that much memory available, a RAM upgrade is recommended to achieve the best performance.

On Windows, you can see the free available memory by opening the Windows Task Manager and clicking the Performance tab.

Do you need Administrator privileges on the client machine to modify Java runtime settings?

It depends on who installed Java on the machine. If the Administrator installed it, only he will have permission to modify Java runtime settings.

What is the -Xmx Java runtime parameter?

It sets the maximum size of the heap. The default value is 64Mb.

Are there other Java runtime parameters?

Yes, there are several other Java runtime parameters that you can configure. For a complete list, see the Java Control Panel documentation.